

LAW OFFICE OF JUSTIN P. MILLER
111 EAST HIGH STREET, SUITE 2 – BELLEFONTE, PA 16823
814.359.7529 – 814.690.1556 FAX
JUSTIN@JPMILLER.COM

Estate Planning Information – Personal and Confidential

Name: _____ Date: _____

Spouse: _____ Birthdate: _____

Address: _____ Birthdate: _____

Township/Borough: _____ City: _____

State: _____ Zip code: _____ County: _____

Home Phone: _____ Work Phone: _____

Cell Phone: _____ Email: _____

Your Occupation: _____

Spouse's Occupation: _____

You SSN: _____ Spouse's SSN: _____

Previous Marriages: You: _____ Spouse: _____

Children: _____

Name	Birthdate	Marital Status	SSN
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Grandchildren (identify parents):

Assets

Owner

	Husband	Wife	Joint
Real Estate (note size of mortgage)			
Cash or equivalents (CDs, checking accounts, money market accounts)			
Stocks and Mutual Funds			
Bonds			
Retirement Savings (IRA, 401(k))			
Deferred Compensation			
Profit Sharing and Pension Plans			
Safe Deposit Box (bank)			
Tangible Personalty of Special Nature (antique collections, boats, etc.)			
Expectancies			
Life Insurance (company name, amount)			
Other			

Liabilities other than mortgage and routine charge card balances (notes, judgments, support orders, etc.): _____

Other documents (Check and bring to meeting):

Previous Wills: _____

Previous Trust Agreements: _____

Antenuptial Agreement: _____

Property Settlement Agreement: _____

Business Agreements (partnership, shareholder, deferred compensation): _____

Employee Benefit Plans: _____

Do you presently have long-term care insurance? _____

Do you own any firearms? _____

Are the firearms registered? _____

Expectancies, interest in other estate and trusts (Please give fiduciary, nature of interest, and value): _____

Gifts (Have any gifts requiring gift tax returns been made? If yes, give dates, amount, donee, and attach a copy of the return): _____

Executors and Alternates (names and addresses):

Trustees and Alternates (names and addresses):

Guardians of Minors and Alternates (names and addresses):

