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# **ESTATE PLANNING CLIENT INFORMATION WORKSHEET**

*The purpose of this Client Information Worksheet is to help prepare you for our upcoming estate planning consultation. Completing the worksheet will take only ten or fifteen minutes and is time well spent, because it will allow us to spend more time discussing the two fundamental issues at the heart of proper estate planning -- everyone that you love and everything that you own.*

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**FAMILY INFORMATION**

**Client 1**

**Client 2 (if applicable)**

**Name-**

**Name-**

**DOB-**

**Social Security-**

**DOB-**

**Social Security-**

**Employer-**

**Employer-**

**Occupation-**

**Occupation-**

**Street Address-**

**City-**

**State-**

**Zip-**

**County-**

**Home Phone-**

**Work Phone-**

**Cell Phone-**

**Email-**

**Email-**

**Marital Status-**

**Referred By-**

**Date of Marriage-**

**Children & Other Dependents**

Full Name

Birth Date

Parent(s)

M/F

Married

Children

**Advisors**

**Name**

**Address**

**Phone**

Accountant

Financial Planner

Homeowners Insurance

**Trustworthy Family & Friends**

*Full Name /Relationship*

If you were unable to handle your financial and legal affairs, whom would you trust to manage them for you? *(Try to list 3, if possible)*

Client 1	Client 2

If you were incapacitated and unable to make your own health care decisions, whom would you appoint to act on your behalf? *(Try to list 3, if possible)*


Whom would you entrust with the responsibility of being your children’s guardian? *(Try to list 2, if possible)*


**Important Questions**

- Have either of you ever had a Will or Trust?
- Are either of you the beneficiary of a will or a trust?
- Are either of you not a U.S. citizen?
- Does any family member have special needs?
- Have either of you ever signed a pre- or post-marital agreement?
- Do either of you have children from a previous marriage?
- Do either of you anticipate inheriting or receiving a substantial gift?
- Did either of you have substantial assets before you were married?
- Have either of you ever filed a federal or state gift tax return?
- Do either of you own or operate a family business?
- Are there any charities or causes that you would like to support?

Yes	No

If you have answered “yes” to any of these questions or have any special concerns, please provide any details that you think would be helpful.

**FINANCIAL INFORMATION**

**SCHEDULE A**

*(For additional account / asset information please use Page 7)*

**REAL PROPERTY** *(Please Bring Copies Of All Deeds & Legal Descriptions To Our Meeting)*

<i>Owner</i>	<i>Address</i>	<i>Value</i>	<i>Mortgage Balance</i>

**CHECKING ACCOUNTS**

<i>Owner</i>	<i>Bank</i>	<i>Address</i>	<i>Phone Number</i>	<i>Acct. No</i>	<i>Amount</i>

**SAVINGS ACCOUNTS**

<i>Owner</i>	<i>Bank</i>	<i>Address</i>	<i>Phone Number</i>	<i>Acct. No</i>	<i>Amount</i>

**BROKERAGE/INVESTMENT ACCOUNTS** (*Non-Retirement*)

<i>Owner</i>	<i>Type</i>	<i>Institution</i>	<i>Address</i>	<i>Phone Number</i>	<i>Acct. No</i>	<i>Amount</i>

**RETIREMENT ACCOUNTS** (*IRA, 401K, Pension Plan Etc.*)

<i>Owner</i>	<i>Institution</i>	<i>Address</i>	<i>Phone Number</i>	<i>Type</i>	<i>Acct. No</i>	<i>Amount</i>

**LIFE INSURANCE POLICIES**

<i>Owner</i>	<i>Institution</i>	<i>Address</i>	<i>Phone Number</i>	<i>Type</i>	<i>Acct. No</i>	<i>Amount</i>

**BUSINESS INTERESTS**

<i>Name of Business</i>	<i>Type of Business (Inc./LLC/Sole Proprietor / Partnership)</i>	<i>Value</i>

**PERSONAL PROPERTY & OTHER ASSETS OF SIGNIFICANT VALUE**

<i>General Description</i>	<i>Overall Value</i>

**INCOME/SAVINGS**

*Approximate Gross Income Per Year* *Amount* \_\_\_\_\_

**ADDITIONAL ACCOUNTS AND ASSETS:**

<i>Owner</i>	<i>Type</i>	<i>Institution</i>	<i>Address</i>	<i>Acct. No</i>	<i>Value / Mortgage Balance</i>

# Important Information Regarding Transferring of Title & Financial Accounts

In order to prepare deeds and documents required to transfer title of your real property & other accounts to your living trust, please bring with you as much information/documentation as you can for the following:

**Real Property (Homes, lots, etc. – all states):** Address and **complete** copy (including **complete legal description**) of your recorded deed. Look for deeds with names like: *Individual Deed, Corporation Grant Deed, Grant Deed*, etc. Deed of trust is not the document we are looking for.

**Timeshare Property:** Name and address of timeshare property *and the unit number and season of each timeshare*. A complete/recorded copy of your deed should give us this information.

**Financial Information:** Contact information for your various financial accounts to assist in account transfers. The first page of the statement from financial institutions is usually the easiest way to provide this information.

**Please provide as much information  
and documentation as possible to  
expedite the title transfer.**

## Privacy Policy

In the course of providing our clients with income tax, estate tax, and gift tax advice, we receive significant nonpublic personal financial information from our clients from the following sources:

**Information You Provide:** Our client engagements routinely require us to obtain private information about our clients so that we can proceed with the various services we perform for clients within the business relationship.



Other Sources: Depending upon the particular service a client has engaged the firm to complete, we may request nonpublic personal information concerning the matter at hand. However, this information is never obtained without our client's specific authorization of the type of information and the source(s) from which it may be obtained.

#### Disclosure of Nonpublic Personal Information

If you are a client of our firm, you may rest assured that all information that we receive from you is held in confidence, and is not released to people outside the firm, except when we obtain your express consent, or as required under an applicable law. For example, in estate planning matters, with your permission, we request a client's permission to do the following:

1. consult with your other advisors to develop a comprehensive asset strategy for your family;
2. communicate with those persons necessary to facilitate re-titling of your assets; and
3. upon your death or disability will share necessary information with your helpers (trustee, executor, power of attorney agent) to help them carry out your plan instructions.

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and in, some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

#### Opt Out Provision

If there is any information which you feel our client confidentiality policy might not affect and you want even greater assurance, you may notify us that you do not want us to release generally your nonpublic personal information--even though we don't do it anyway. You may also notify us at any time that you do not want us to disclose information to particular financial advisors or helpers, even though you may previously have given us permission to do so. If so, you should do that in writing, and we will honor your request."