

# LAW OFFICES OF KATHLEEN FOWLER

## Information Sheet

The information being requested below is considered confidential and will not be released or otherwise disseminated without your express permission. The information is intended solely for use by the Law Offices of Kathleen Fowler in the performance of document preparation and other related representation on your behalf.

### Name

\_\_\_\_\_  
First Middle Initial Last date of birth Social Sec. #

### Spouse's Name

\_\_\_\_\_  
First Middle Initial Last date of birth Social Sec. #

Any prior marriage? \_\_\_\_\_

If yes, please give names and date of death or divorce \_\_\_\_\_

Your permanent residence address:

Own/lease (circle one) Is this your state of residency? y/n

\_\_\_\_\_  
US Citizens? y/n \_\_\_\_\_

\_\_\_\_\_  
Home phone number \_\_\_\_\_

Work phone number \_\_\_\_\_

Cell phone number \_\_\_\_\_ Fax# \_\_\_\_\_ email \_\_\_\_\_

Your seasonal address:

Own/lease (circle one)

\_\_\_\_\_  
Seasonal address phone number \_\_\_\_\_

Children: *please enter as much complete information as possible  
please continue on another sheet if necessary*

| Full name | Address | Telephone | Social Sec. # | date of birth | marital status |
|-----------|---------|-----------|---------------|---------------|----------------|
|-----------|---------|-----------|---------------|---------------|----------------|

### Grandchildren

| Full name | Parent's name | date of birth |
|-----------|---------------|---------------|
|-----------|---------------|---------------|

Do you have any deceased children and/or grandchildren? Yes No

OVER

**Assets**

Part of the estate planning process includes a review of assets and how they are titled. Changes may be recommended so please complete as fully as possible. Use additional sheets if necessary

**Real Estate Owned (include Timeshares)**

Address Estimated value \_\_\_\_\_ Mortgage held by \_\_\_\_\_

\_\_\_\_\_

Names Title is held in: \_\_\_\_\_

Address Estimated value \_\_\_\_\_ Mortgage held by \_\_\_\_\_

\_\_\_\_\_

Names Title is held in: \_\_\_\_\_

Do you have an owner's title insurance policy on any of these properties? \_\_\_\_\_

If yes, please provide a copy of your insurance binder.

**Bank Accounts**

| Bank name | Type of account | Average balance | Names on account |
|-----------|-----------------|-----------------|------------------|
|-----------|-----------------|-----------------|------------------|

**Investments**

| Broker/Security | Type of investment | Average balance | Names on account/shares |
|-----------------|--------------------|-----------------|-------------------------|
|-----------------|--------------------|-----------------|-------------------------|

**Retirement Plans-Custodian**

| IRA/annuity/401(k)/403(b) | Name on acct | Named beneficiary | Balance |
|---------------------------|--------------|-------------------|---------|
|---------------------------|--------------|-------------------|---------|

**Life Insurance**

| Company | Insured | Policy Owner | Beneficiary | Death Benefit |
|---------|---------|--------------|-------------|---------------|
|---------|---------|--------------|-------------|---------------|

**Business Interests**

| Name/form | Ownership | Estimated Value |
|-----------|-----------|-----------------|
|-----------|-----------|-----------------|

**Other assets**

Automobile Make & model &Year \_\_\_\_\_ Name on title \_\_\_\_\_

Savings Bonds Value \_\_\_\_\_ Name on bonds \_\_\_\_\_

Collectibles/Antiques/Art \_\_\_\_\_ Boat(if any) \_\_\_\_\_

Please continue on another sheet if necessary