

CLIENT QUESTIONNAIRE

FAMILY INFORMATION

Full name: _____

Spouse's/Partner's: _____

Social security number: _____

Spouse's/Partner's: _____

Other or former names: _____

Spouse's/Partner's: _____

Home address: _____

Spouse's/Partner's (if not the same): _____

If you have moved to California from another state, name the state and years of residence there:

_____ Date you moved to California: _____

Do you have other residences in California? Yes: ___ No: ___

Contact information:

(Home phone): _____ (Work phone): _____ (Fax): _____

(Cell): _____ (E-mail): _____

Spouse's/Partner's work number: _____

Birthdate: _____

Birthplace: _____

Spouse's/Partner's: _____

Driver's license number: _____

Occupation: _____

Spouse's/Partner's: _____

Employer: _____

Employer's address: _____

Provide the following information about your children (including stepchildren or foster children). Write "NA" on the first line if you have no children.

<u>Name</u>	<u>Living?</u>	<u>Age</u>	<u>Birthdate</u>	<u>Married?</u>	<u>City/State of Residence</u>
_____	Yes No		_____	Yes No	_____
_____	Yes No		_____	Yes No	_____
_____	Yes No		_____	Yes No	_____
_____	Yes No		_____	Yes No	_____
_____	Yes No		_____	Yes No	_____
_____	Yes No		_____	Yes No	_____

Do you presently have a Will? Yes: ___ No: ___ If so, what is the date on the Will? _____
Was it signed in California? Yes: ___ No: ___ If not, where? _____

Spouse/Partner have a Will? Yes: ___ No: ___ If so, what is the date on the Will? _____
Was it signed in California? Yes: ___ No: ___ If not, where? _____

Are you a beneficiary, trustee (single or joint), or creator of a trust? Yes: ___ No: ___ If so, what is the date of the trust? _____

Is your spouse/partner a beneficiary, trustee (single or joint), or creator of a trust?
Yes: ___ No: ___ If so, what is the date of the trust? _____

Have you signed a prenuptial, postnuptial or pre-domestic partnership agreement? Yes: ___
No: ___ If so, what is the date of the agreement and name of the spouse/partner involved? _____

Provide the following information regarding your former marriages:

<u>Name of former spouse/partner</u>	<u>Living?</u>	<u>Date of death or divorce</u>
_____	Yes/No	_____
_____	Yes/No	_____

ASSETS AND LIABILITIES

ASSETS

- A. Liquid assets: cash (dividends, etc.); savings accounts; checking accounts; money market accounts; certificates of deposit; mutual funds.

<u>Item Identification/Account Number</u>	<u>Location (Name/Address of Bank)</u>	<u>Value</u>

- B. Other personal property (everything except liquid assets): stocks and bonds; automobiles; other vehicles; precious metals; safe deposit contents; household goods, furniture, and appliances; china, crystal, and silver; jewelry; furs and clothing; art works, photographs, letters, medals, collectibles, family heirlooms, artifacts, and antiques; tools and machinery; computers and electronic equipment; sports equipment; hobbies; camera, video, and recording equipment; books; musical instruments; valuable livestock/animals; pets; money owed to you (personal loans, etc.); vested interest in profit sharing plan, stock options, etc.; limited partnerships; trust interest; vested interest in retirement plans, IRAs, death benefits, annuities; life insurance; miscellaneous personal property not already listed.

<u>Item Identification</u>	<u>Location</u>	<u>Net Value*</u>

*Net value=Estimated value minus debts on the asset.

- C. Real estate: agricultural land; boat/marina slip; cemetery plots; condominiums; cooperatives; timeshares; duplexes; houses; mobile homes; rental properties; undeveloped land; vacation homes.

<u>Property Address (including county)</u>	<u>Net Value*</u>

TOTAL NET VALUE OF ALL ASSETS _____

*Net value=Estimated value minus debts on the asset.

LIABILITIES

NOTE: To reach the net value of assets listed above, you should already have listed and subtracted the debt on the asset. Therefore, you should include below only those liabilities not taken into account above. Do not include regular monthly bills such as those for utilities, telephone, and credit cards, but do take into account whether you have guaranteed any obligations of someone else (even if you don't expect to have to pay).

A. Personal property debts (personal loans with banks, major credit card debt, etc.) and other personal debts.

<u>Item Description</u>	<u>Amount Due</u>	<u>Due Date</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

B. Taxes (include only past and currently due taxes - do not include future or estimated estate taxes).

<u>Item Description</u>	<u>Amount Due</u>	<u>Due Date</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

C. Other liabilities (such as legal judgments, guarantees, accrued child support, etc.).

<u>Item Description</u>	<u>Amount Due</u>	<u>Due Date</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

TOTAL LIABILITIES _____

TOTAL NET VALUE OF ALL ASSETS (see assets section)

TOTAL LIABILITIES (see liabilities section)

NET WORTH

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