

**CONFIDENTIAL
INFORMATION
SHEETS**

THE ZYSMAN LAW FIRM

—◆—
A PROFESSIONAL CORPORATION

Preserving the Wealth of Families

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Trust and Estate Planning

Business Formation and Planning

Probate and Estate Administration

CONFIDENTIAL INFORMATION SHEET

PLEASE PRINT

Decedent: Full Legal Name: _____ D.O.B. _____ SSN _____

Spouse: Full Legal Name: _____ D.O.B. _____ SSN _____

HOME ADDRESS: _____

HOME #: _____ WORK #: _____ CELL #: _____

DATE OF DEATH: _____

OBLIGATIONS OF DECEDENT TO FORMER SPOUSE OR OBLIGATIONS TO CHILDREN:

DID HUSBAND AND WIFE SIGN PRE/POST MARRIAGE AGREEMENT? (Y or N) _____

Full name of Children & City and State of Residence	Whose? (H, W or Both)	D.O.B.	Marital Status? (S/M/D/W)	Do they have kids? Number?
1. _____	_____	_____	_____	_____

2. _____	_____	_____	_____	_____

3. _____	_____	_____	_____	_____

4. _____	_____	_____	_____	_____

5. _____	_____	_____	_____	_____

6. _____	_____	_____	_____	_____

Did Decedent have a Will? _____ Date of Will: _____

Did Decedent Have a Living Trust? _____ Date of Trust? _____

Did Decedent file a gift tax return during life? _____

ASSET LIST

(Please place estimated value under proper ownership)

Real Property (Incl. State Located)	In Decedent's Name Alone	Joint with Spouse/3rd Party	Decedent's Trust/Joint Trust	Spouse's Trust
	\$	\$	\$	\$
Savings/Checking Accts. (Institutions)	In Decedent's Name Alone	Joint with Spouse	Decedent's Trust/Joint Trust	Spouse's Trust
	\$	\$	\$	\$
Mutual Funds Money Markets (Institutions)	In Decedent's Name Alone	Joint with Spouse	Decedent's Trust/Joint Trust	Spouse's Trust
	\$	\$	\$	\$
Stocks or Bonds (Institutions)	In Decedent's Name Alone	Joint with Spouse	Decedent's Trust/Joint Trust	Spouse's Trust
	\$	\$	\$	\$
Business Interests (Type)	In Decedent's Name Alone	Joint with Spouse	Decedent's Trust/Joint Trust	Spouse's Trust
	\$	\$	\$	\$

ASSET LIST

(Please place estimated value
under proper ownership, not beneficiary)

Life Insurance (Death Benefit)	Decedent's	Named Beneficiary(ies)
	\$	

Traditional I.R.A.s/Retirement Accts	Decedent's	Named Beneficiary(ies)
	\$	

Roth I.R.A.s	Decedent's	Named Beneficiary(ies)
	\$	

Annuities	Decedent's	Named Beneficiary(ies)
	\$	

Other (Stock Options, Notes Receivable rare autos, boats, jewelry, etc. . .)	Decedent's	Spouse's
	\$	