



# Estate Planning

Fact Finder



# Pinnacle Financial Services

## Personal Information

<b>&gt; Client Name</b> _____		<b>&gt; Spouse's Name</b> _____	
> Address	_____	> Address	_____
> City	_____	> City	_____
> State, Zip	_____	> State, Zip	_____
> Home Phone	_____	> Home Phone	_____
> Date of Birth	_____	> Date of Birth	_____
> Retirement Age	_____	> Retirement Age	_____
> U.S. Citizen	Yes ( )      No ( )	> U.S. Citizen	Yes ( )      No ( )
> Employer	_____	> Employer	_____
> Work phone	_____	> Work phone	_____
> Email	_____	> Email	_____
<b>&gt; Dependents</b> _____		<b>&gt; Dependents</b> _____	
> Name	_____	> Name	_____
> Date of Birth	_____	> Date of Birth	_____
> Of This Marriage	_____	> Of This Marriage	_____
> Special Needs	_____	> Special Needs	_____
<b>&gt; Dependents</b> _____		<b>&gt; Dependents</b> _____	
> Name	_____	> Name	_____
> Date of Birth	_____	> Date of Birth	_____
> Of This Marriage	_____	> Of This Marriage	_____
> Special Needs	_____	> Special Needs	_____

## Planning Goals

**> Goals** \_\_\_\_\_

## Financial Information

<b>&gt; Client Name</b> _____		<b>&gt; Spouse's Name</b> _____	
> Annual Income	_____	> Annual Income	_____
> Investment Income	_____	> Investment Income	_____
> Other Income	_____	> Other Income	_____
> Total	_____	> Total	_____

## Current Life Insurance

<b>&gt; Company</b> _____	<b>&gt; Company</b> _____	<b>&gt; Company</b> _____
> Benefit Amount	> Benefit Amount	> Benefit Amount
> Premium	> Premium	> Premium
> Cash Value	> Cash Value	> Cash Value
> Type	> Type	> Type
> Owner	> Owner	> Owner
> Insured	> Insured	> Insured
> Beneficiary	> Beneficiary	> Beneficiary



# Pinnacle Financial Services

## Long Term Care

### > Insured

> Monthly Benefit	_____	> Annual Premium	_____
> Company	_____	> Home Care Benefits	_____
> General Information		> Nursing Home Benefits	

## Net Worth

Owner Key: Husband (H) Spouse (S) Joint (J) Community (C) Other (O)

> Assets	Current Fair Market Value	Expected Growth Rate	Owner(s)
> Cash or Equivalent			
> Life Insurance			
> Qualified Plans			
> Stocks, Bonds & Mutual Funds			
> Primary Residence			
> Other Real Estate			
> Business Interests			
> Personal; Belongings			
> Other			

> Liabilities	Name	Client	Ownership/Spouse	Joint
> Personal Debt				
> Business Debt				

> Total Liabilities	\$ _____	\$ _____	\$ _____
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> Total Assets - Total Liabilities = Net Worth	\$ _____	- \$ _____	= \$ _____
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# Pinnacle Financial Services

## > Expected Inheritance

> \$ \_\_\_\_\_

> \$ \_\_\_\_\_

> \$ \_\_\_\_\_

> \$ \_\_\_\_\_

## Estate Planning

### > Wills

> Client Name	_____	> Spouse's Name	_____
> Date	_____	> Date	_____
> Executor/Executrix	_____	> Executor/Executrix	_____
> Last Review Date	_____	> Last Review Date	_____

### > Living Trusts

> Client Name	_____	> Spouse's Name	_____
> Date	_____	> Date	_____
> Trustee/Sucessor Trustee	_____	> Trustee/Sucessor Trustee	_____
> Last Review Date	_____	> Last Review Date	_____

### > Irrevocable Trusts

> Client Name	_____	> Spouse's Name	_____
> Date	_____	> Date	_____
> Trustee	_____	> Trustee	_____
> Last Review Date	_____	> Last Review Date	_____

## Will And Trust Arrangements

### > Provision of Wills

> All to Spouse

> A/B Trust

> Charitable Request

> Other

**Client**

**Spouse**

### > Trust Details

> Revocable

> Irrevocable

> Minor's Trust

> Other

**Beneficiary(ies)**

**Trust Assets**



# Pinnacle Financial Services

## Special Provisions For Minor Children And Other Dependents

<b>&gt; Gifts made</b>	<b>&gt; Gifts made</b>	<b>&gt; Gifts made</b>	<b>&gt; Gifts made</b>
> Donor _____	> Donor _____	> Donor _____	> Donor _____
> Donee _____	> Donee _____	> Donee _____	> Donee _____
> Date _____	> Date _____	> Date _____	> Date _____
> Value _____	> Value _____	> Value _____	> Value _____

## Other Documents Needed

	Client's	Spouse	Received
> Buy Sell			
> Deferred			
> Financial Statement			
> Qualified Plans			
> Summary			
> Other			
> Other			
> Other			

## Advisors

<b>&gt; Attorney</b>	<b>&gt; Banker</b>	<b>&gt; Insurance Agent</b>
> Name _____	> Name _____	> Name _____
> Address _____	> Address _____	> Address _____
_____	_____	_____
> Phone _____	> Phone _____	> Phone _____
<b>&gt; Accountant</b>	<b>&gt; Financial Planner</b>	<b>&gt; Other</b>
> Name _____	> Name _____	> Name _____
> Address _____	> Address _____	> Address _____
_____	_____	_____
> Phone _____	> Phone _____	> Phone _____