

Confidential Data Sheet



CLIENT

SPOUSE (if any)

Name:

Name:

Name as you want it to appear on document, if different:

Mailing Address:

City:

State:

Zip:

Phone Number:

Spouse's Phone Number:

Email Address:

Spouse's Email Address:

Date of Birth:

Spouse's Date of Birth:

US Citizen:

Yes

No

US Citizen:

Yes

No

Occupation:

Spouse's Occupation:

Did you sign a pre- or post-marital agreement?:

Yes

No

Name of investment advisor:

Name of CPA/Accountant:

Referred by:

CHILDREN / BENEFICIARIES

Name:

Date of Birth:

Child of Client / Spouse / Both/Other:

FIDUCIARIES

Personal Representatives/Trustees – As Personal Representative, the people you name would be responsible for paying your last illness and burial expenses, probating any assets that you own outside of a Trust, and ensuring the appointment of the guardians and conservators of your minor children, if any. They were formally known as the “executors” of an estate. As Trustee, the people you name would be responsible for the management and investment of all Trust assets, including determining the amount and frequency of distribution to the beneficiaries of the Trust.

First:

Second:

Third:

Guardians (for minor and/or disabled children) – These individuals would be responsible for raising your minor children (children under 18) as well as any disabled children. Guardians would not be responsible for the assets you leave your children, unless they are also named the Trustees. They would be responsible for educational, housing and medical decisions.

First:

Second:

Third:

FIDUCIARIES

Medical Power of Attorney – If you were physically unable to make medical decisions on your own behalf during your lifetime, who would you want to make those decisions for you?

First for Client:

Second for Client:

First for Spouse:

Second for Spouse:

Financial Power of Attorney – Is there anyone you want to empower to make financial decisions on your behalf? (Note: A Financial Power of Attorney is a very powerful document and should only be given to individuals you have absolute confidence in, but is very beneficial if you were out of town or were disabled and could not make such current decisions.)

First:

Second:

Third:

GENERAL QUESTIONS

If you have children

Common Trust (for general needs of young adult children, if any) – Age at which you want the Common Trust to divide into separate trusts for all children (typically age 21 to 25) _____

At what age(s) do you want your children to be able to control assets you leave to them?

- a. Specific Age: (usually 25 to 30) _____
- b. Staggered Control 1/3 at age: _____ 2/3 at age: _____ all at age: _____
- c. Other _____

For Everyone

Common Disaster: If you and all the members of your immediate family (spouse, children, and grandchildren) were to die and there were still assets in your estate(s), the proceeds should go to (check one):

Your extended family (default).

Charity. If so, name(s) of charity(ies): _____

Specific individuals. If so, whom? _____

NOTES / COMMENTS / SPECIAL CONCERNS

TABLE OF ASSETS

REAL ESTATE	CURRENT FAIR MARKET VALUE	CURRENT TITLING (i.e., Individual, Joint, Business)
	\$	
	\$	
	\$	
	\$	
TOTAL ESTATE VALUE:		
MINUS DEBTS:		
NET VALUE:		

LIFE INSURANCE POLICIES	TERM OR PERMANENT?	DEATH BENEFIT VALUE	NAME OF INSURED
		\$	
		\$	
		\$	
		\$	
NET VALUE:			

TABLE OF ASSETS

PRE-TAX RETIREMENT PLANS (IRAs, 401ks, 403bs)	CURRENT FAIR MARKET VALUE	CLIENT/SPOUSE
	\$	
	\$	
	\$	
	\$	
NET VALUE:		

AFTER TAX INVESTMENTS (Brokerage Accounts, Mutual Funds)	CURRENT FAIR MARKET VALUE	CURRENT TITLING (i.e., Individual, Joint, Business)
	\$	
	\$	
	\$	
	\$	
NET VALUE:		

TABLE OF ASSETS

BUSINESS INTERESTS (LLCs, Corporations, Partnerships)	CURRENT FAIR MARKET VALUE	OWNERSHIP PERCENTAGE
	\$	
	\$	
	\$	
	\$	
NET VALUE:		

BANK ACCOUNTS (Checking, Savings, Money Markets, CDs)	CURRENT FAIR MARKET VALUE	CURRENT TITLING (i.e., Individual, Joint, Business)
	\$	
	\$	
	\$	
	\$	
NET VALUE:		

TABLE OF ASSETS

OTHER ASSETS	CURRENT FAIR MARKET VALUE	CURRENT TITLING (i.e., Individual, Joint, Business)
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	

NET VALUE:

GRAND TOTAL NET ESTATE VALUE (Pages 7-10)
\$



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