ROBINSON & WILSON

A LAW CORPORATION Street: 11665 Avena Pl #108, San Diego, CA 92128 Mail: P.O. Box 270099 San Diego, CA 92198

Roberta J. Robinson Tel: 858.485-1990 Daniel J. Wilson RobertaRobinson@TrustLaw.us Fax: 858.487-8240 DanielWilson@TrustLaw.us www.TrustLaw.us

State Bar of California Legal Specialist Estate Planning, Trust & Probate Law

Name #1 (as it appears on Driver's License):

GENERAL INFORMATION

Master of Laws in Taxation State Bar of California Legal Specialist Estate Planning, Trust & Probate Law

Name #2 (as it appears on Driver's License):

ESTATE PLANNING DATA SHEET

Date:	Referred By:		
Birthdate:	Birthdate:		
U.S. Citizen? Yes	No U.S. Citizen? Yes No		
Non U.S. Citizen: Resident Non-Reside	nt Non U.S. Citizen: Resident Non-Resident		
Address:			
Phone #1:	Phone #2:		
Email #1:	Email #2:		
Marriage Or Registered Domestic Pa	artnership: Yes No		
	·		
Date: State:	Premarital Agreement? Yes No		
Year Moved To CA:			
Marital Settlement Agreement From Prior Marriage? Yes No			
Affects Pension Plan, Life Insurance, Child Support, and/or Spousal Support? Yes No			

GENERAL INFORMATION				
Prior Will/Trust: Yes No		Prior Gifts:	Yes	No
(Please Provide A Copy Of Existing Wills/	[/] Trust)	(Please Provid	e Copy O	f Gift Tax Return)
CPA/Accountant Name:				
Telephone: Email:				
Company:				
Children: (All Children Whether Living, I				
Name:	Mailir	Mailing Address and Phone number:		
Name:	Mailir	Mailing Address and Phone number:		
Name:	Mailir	ng Address and	Phone n	umber:
Name:	Mailing Address and Phone number:			
MY ESTATE PLANNING GOALS ARE AS FOLLOWS:				

ASSETS

<u>Please Check Title To Your Assets</u> - Joint Tenancy, Community Property, Separate Property

Personal Effects of Significant Value					
Item(s)			Approx. Value		
Deal Catata / Drive carry of Dead	if eveilable)				
Real Estate: (B <u>ring copy of Deed,</u> Address	Ownership/Title	Debt (est.) Market Value (est.)		
Address	Ownership/ Title	שפטו (פזו.	j iviai ket value (est.)		
	-				
Checking/Savings Accounts: (Brin	g recent statements. if a	vailable)			
Institution	Title/Ownership	,	Current Balance		
Investment Accounts/Securities:		ge Account			
Institution	Title/Ownership		Current Balance		
	······				

Retirement/Pensio	n Plans (Include IF	RA's, 401k's, Cor	porat	e Plans)			
Institution	Income Earne	r 1st Benefic	iary	2nd Beneficia	ary	Market '	Value
				_			
Life Insurance And Company/Type	Policy Owner	Insured/Annuit	tant	1st	2nc	ı	Death
(Term or Whole)	Policy Owner	insureu/Annun	ldIII	Beneficiary		neficiary	Benefit
(Term or Whole)				Beneficialy	Dei	ichicial y	Benefit
Money Owed to Yo		sory Notes)					
Debtor Name and e	explanation		Cu	rrent Balance	Se	ecured? (Y or N)
Other Assets? (Rus	inoss intorests. Me	anov from Irrove	cable	Truct)			
Other Assets? (Business interests, Money from Irrevocable Trust) Asset and Description Value							
, 100ct and Description	011					raiac	

WHAT IS THE VALUE OF MY ESTATE?	
Please add the total of all your assets here:	
PERSONAL EFFECTS	
REAL ESTATE (NET OF MORTGAGE)	
CASH ACCOUNTS	
SECURITIES	
SECONTIES	
INSURANCE AND ANNUITIES	
RETIREMENT PLANS	
MONEY OWED TO YOU	
OTHER ASSETS	
TOTAL	

PREPARING FOR THE FIRST MEETING

These are the types of decisions we will discuss during your first estate planning meeting.

Feel free to write down your initial thoughts.

GUARDIAN: Who will raise your minor children and be responsible for their physical care?

First Choice? Second Choice?

TRUSTEE/FIDUCIARY: Who will handle your finances and manage your assets in the event of

your incapacity or death?

First Choice? Second Choice?

HEALTH CARE: Who will make your health care decisions if you are incapacitated, including terminating life support? Do you have long term health care insurance?

First Choice? Second Choice?

DISTRIBUTION AFTER DEATH:

Do you have a plan for distribution of your personal effects? (High Value Items or Sentimental Items) (Consider Making a List of Who Should Receive the Personal Effects)

Who will be the beneficiaries of your estate after your death? (Family, Friends, Charity)

How should your assets be distributed? (Specific Dollar Amounts, Specific Assets, Percentages among individuals/charities)

AGES: At what age(s) should your beneficiaries inherit? Immediately? At Certain Age? Installments? (ex. 25% at age 25, 50% at age 30, 100% at age 35)

*******THIS IS NOT A TESTAMENTARY DOCUMENT******