ACUÑA, REGLI & KLEIN, LLP

ESTATE PLANNING INFORMATION

NOTE: PLEASE PRINT COMPLETE LEGAL NAMES AS YOU WANT THEM TO APPEAR IN YOUR ESTATE PLANNING DOCUMENTS.

1. Husband _____ Birthdate_____ SS# _____

2. Wife _____ Birthdate _____SS# _____

3. Address _____Phone _____

   City _____ State _____ Zip Code _____

4. CHILDREN (First Name, Middle Initial, Last Name):

   Child #1 _____ Birthdate _____
   Address _____ Phone _____
   City _____ State _____ Zip Code _____

   Child #2 _____ Birthdate _____
   Address _____ Phone _____
   City _____ State _____ Zip Code _____

   Child #3 _____ Birthdate _____
   Address _____ Phone _____
   City _____ State _____ Zip Code _____

   Child #4 _____ Birthdate _____
   Address _____ Phone _____
   City _____ State _____ Zip Code _____

5. FINANCIAL AGENTS (Trustee/Executors)

   Agent #1 _____
   Address _____ Phone _____
   City _____ State _____ Zip Code _____

   Agent #2 _____
   Address _____ Phone _____
   City _____ State _____ Zip Code _____

   Agent #3 _____
   Address _____ Phone _____
   City _____ State _____ Zip Code _____

6. HEALTH AGENTS

HUSBAND'S

Husband's Health Agent #1 _____
Address _____ Phone _____
City _____ State _____ Zip Code _____

Husband's Health Agent #2 _____
Address _____ Phone _____
City _____ State _____ Zip Code _____

Husband's Health Agent #3 _____
Address _____ Phone _____
City _____ State _____ Zip Code _____

WIFE'S

Wife's Health Agent #1 _____
Address _____ Phone _____
City _____ State _____ Zip Code _____

Wife's Health Agent #2 _____
Address _____ Phone _____
City _____ State _____ Zip Code _____

Wife's Health Agent #3 _____
Address _____ Phone _____
City _____ State _____ Zip Code _____

7. GUARDIANS (only for children under 18 years of age)

Guardian #1 _____
Address _____ Phone _____
City _____ State _____ Zip Code _____

Guardian #2 _____
Address _____ Phone _____
City _____ State _____ Zip Code _____

Guardian #3 _____
Address _____ Phone _____
City _____ State _____ Zip Code _____

DON'T FORGET . . .

_____ Statements for all your assets _____ Addresses for all real estate