Summary of the Client Profile Form

Use this Checklist before your visit to our office. Collecting the following information ahead of time will enable us to focus our time together addressing your particular needs:

- Names and addresses of your immediate family members and people you would like to serve as executors, trustees and guardians for your children.
- Bank account information, such as balances, account numbers, locations of accounts and safe deposit boxes.
- Pension and retirement account information, including IRAs, 401(k)s, Roths, Keoghs, profit sharing plans, stock options and government benefits.
- Detailed description of any stocks and bonds owned, insurance policy information, including policy location and beneficiaries, as well as a copy of the actual policy.
- Copies of community property agreements, prenuptial or postnuptial agreements, divorce decrees and any previous wills or will codicils.
- An overall description of your income sources and assets, including real estate.
- A list of debts owed, including amounts outstanding and to whom they are owed.
- A list of specific “bequests” you want to make in your will, such as “$5,000 to my niece, Tipper.”

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