

Date: \_\_\_\_\_

# Mignanelli & Associates, Ltd.

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## ESTATE PLANNING INFORMATION FORM

### Family Information

Please include middle initials, any aliases, etc.

1. Full Name: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Social Security No.: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

2. Spouse/Domestic Partner  
Full Name: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Social Security No.: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

3. Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Telephone: Home: \_\_\_\_\_ Office: \_\_\_\_\_

4. U.S. Citizen: Husband/Domestic Partner: Yes or No      Wife/Domestic Partner: Yes or No

5. Children's  
Full Name:                      Address:                      Date of Birth:                      Marital Status:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Children's  
Spouses:

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7. Grandchildren:

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8. Husband/Domestic Partner's:  
Parents, Brothers, Sisters, Others (please identify relationship):

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9. Wife/Domestic Partner's:  
Parents, Brothers, Sisters, Others (please identify relationship):

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10. Do you have an existing Will and Trust Agreement? If so, please describe:

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## Fiduciary Information

Please include middle initials, any aliases, etc.

1. Choice of Executor/Co-Executor (please include full name, relationship and address):

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2. Choice of Successor Executor/Co-Executor (please include full name, relationship and address):

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3. Choice of Trustee/Co-Trustee (please include full name, relationship and address):

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4. Choice of Successor Trustee/Co-Trustee (please include full name, relationship and address):

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5. Choice of Guardian/Co-Guardian for minor children, if any (please include full name, relationship and address):

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6. Choice of Successor Guardian/Co-Guardian for minor children, if any (please include full name, relationship and address):

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7. Powers of Appointment over trusts:

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## Real Estate

Please use these descriptions in the TYPE column for your Real Estate assets.

Primary Residence      Land      Rental Home      Commercial Property  
 Second Residence      Vacation Home      Rental Property

Type	Description	Owner (Husband, Wife, Joint)	Asset Value

## Bank Account

Please use these descriptions in the TYPE column for your Bank Account assets.

Checking      CD  
 Savings      Money Market

Type	Description	Owner (Husband, Wife, Joint)	Beneficiary	Asset Value



## Insurance

Please use these descriptions in the TYPE column for your Insurance assets.

Term Policy

Universal Life Policy

Whole Life Policy

Variable Life Policy

Type	Company Name	Owner (Husband, Wife, Joint)	Beneficiary	Asset Value

## Business

Please use these descriptions in the TYPE column for your Business assets.

General Partnership

C Corporation

Sole Proprietorship

Ltd. Partnership (Bus.)

S Corporation

LLC

Type	Business Name	Owner (Husband, Wife, Joint)	Asset Value

## Other

Please use these descriptions in the TYPE column for your Other assets.

Collectibles  
Automobiles

Recreational  
Miscellaneous

Probable Inheritance  
Taxable Gifts

Powers of Attorney

Type	Description	Owner (Husband, Wife, Joint)	Asset Value

## Liability

Please use these descriptions in the TYPE column for your Liability assets.

Mortgage  
Personal Loan

Other Loans

Type	Description	Owner (Husband, Wife, Joint)	Asset Value



# PRIVACY NOTICE

Please take a moment to read the following important information about our privacy policy regarding the handling of your personal information. Protecting your privacy is very important to us.

As part of providing you with the legal services you have requested, we need to obtain pertinent personal information from you. That information includes, but may not be limited to, your address, date of birth, employment status, social security number, income, assets, account numbers, etc.

This information may be collected by telephone, in person, in writing, electronically via the internet or by any other means. It is with this information that we may fulfill and service your needs. We treat the information we gather about you in a confidential manner. The trust of our clients is one of our most valuable assets.

- Employees of Mignanelli & Associates, Ltd. having access to your personal information are instructed to use strict standards of care regarding the confidentiality of your personal information.
- We expect persons or organizations that provide services on our behalf to keep client information confidential, using it only to provide the services we have asked them to perform.
- We do not disclose personal information to anyone, except as may be required by law, or at your direction.

Should your relationship with us end, your personal information will remain protected in accordance with our confidentiality practices as outlined in this privacy notice.

Please feel free to call our office should you have any concerns or questions.

Thank you for your valued business.