ADDITIONAL INFORMATION SHEET FOR A MARRIED COUPLE

The following questions allow us to make some basic decisions about your need for estate planning as well as provide an important source of information in the event of your death. This information will be kept in confidence.

(1) Spouse 1's occupation:

____

Spouse 2's occupation:

____

Name, address, and phone number of Spouse 1's employer or former employer:

____

____

Name, address, and phone number of Spouse 2's employer or former employer:

____

____

(2) Is Spouse 1 eligible for any pension, profit sharing, savings, stock bonus, insurance or other plan through his employment? ____________ If yes, please explain:

____

____

____

Is Spouse 2 eligible for any pension, profit sharing, savings, stock bonus, insurance or other plan through her employment? ____________ If yes, please explain:

____

____

____

(3) If either of you have ever been in the military, please state the branch and dates of service:

____

____

(4) Have either of you given anybody large gifts, over $10,000 in any calendar year? __________
If yes, please state when and to whom. Attach an additional sheet of paper if necessary.

Person Receiving Gift	Date	Value

(5) Miscellaneous personal information and other instructions:

____

____

BALANCE SHEET

(6) The simplified balance sheet below is for the purpose of instructing the attorney about the approximate size of your estate and the title to the property. The attorney is entitled to rely on it for that purpose but to use it for no other purpose. It is confidential. This information is necessary to advise you about death taxes and estate planning.

INSTRUCTIONS: If you owe against a particular asset, subtract the debt from the fair market value and write down only your equity. Please use the following initial formats to indicate how you hold title in the parentheses below: MNO for "my name only," JT for "joint tenancy" (usually "or"), CP for "Community Property" (usually "and").

Example: House at 212 Yale Avenue, Claremont CA 91711 (MNO) $100,000.00

For anything else, put a reference number in the parentheses and explain it in the NOTES section. If you do not have adequate room, please add a sheet.

REAL ESTATE	TITLE	EQUITY
1. House at ______________________________	(______)	__________
2. Other? ________________________________	(______)	__________
3. Other? ________________________________	(______)	__________

PLEASE BRING COPIES OF ALL DEEDS TO YOUR INITIAL APPOINTMENT

BANK ACCOUNTS		
1. Checking at ___________________________	(_______)	__________
2. Checking at ___________________________	(_______)	__________
3. Savings at ____________________________	(_______)	__________
4. Savings at ____________________________	(_______)	__________

STOCKS AND BONDS		
1. __________shares of ____________________	(_______)	__________
2. __________shares of ____________________	(_______)	__________
3. __________shares of ____________________	(_______)	__________

VEHICLES

Year	Make	California License		
1. ________	______________	____________________	(________)	_______
2. ________	______________	____________________	(________)	_______
3. ________	______________	____________________	(________)	_______

LIFE INSURANCE

Company	Policy Number	Face Value	Cash Value	Type
________________	________________	____________	____________	______________
________________	________________	____________	____________	______________
________________	________________	____________	____________	______________

1. Collection of ____________________________	(________)	____________
2. Receivable from ________________________	(________)	____________
3. Antiques _______________________________	(________)	____________
4. Jewelry ________________________________	(________)	____________
5. Investment in ___________________________	(________)	____________
6. ____	(________)	____________
7. ____	(________)	____________
8. ____	(________)	____________
	TOTAL	____________

DEBTS (not subtracted from value to state equity above)

1. ____

2. ____

3. ____

TOTAL ____________

NOTES: