

Elisabeth J. Rubel PLLC

Asset Questionnaire for Estate Planning – Single Client

Date Completed: _____

Client Information:

Name:

Address:

DOB:

U.S. Citizen [Y / N]

SUMMARY OF ASSETS

Please enter approximate total values for each category of assets in the appropriate column, depending on who owns the asset.

				TOTAL
Residence (less mortgage)				\$_____
Cottage or condominium (less mortgage)				_____
Other real estate				_____
Bank accounts and other cash deposits				_____
Marketable securities				_____
Closely-held business interest				_____
Life insurance (face amount less policy loans)				_____
Pension or profit-sharing plans, IRAs, 401(k)s, 403(b)s, etc.				_____
Other assets				_____
TOTAL				\$_____

Names (and dates of birth) of children, their spouses, and grandchildren

<u>Children</u>	<u>Dates of Birth</u>	<u>Spouse</u>	<u>Grandchildren</u>	<u>Dates of Birth</u>
_____	_____	_____	_____	_____ _____ _____
_____	_____	_____	_____	_____ _____ _____
_____	_____	_____	_____	_____ _____ _____
_____	_____	_____	_____	_____ _____ _____
_____	_____	_____	_____	_____ _____ _____