

PRELIMINARY FACT FINDER

Name _____

Date of Birth _____

Social Sec. # _____

Spouse _____

Date of Birth _____

Social Sec. # _____

Address _____

Date of Marriage _____

City _____ Zip _____

Previous Marriages: Husband Wife

State _____

United States Citizen Yes No

County of Residence _____

Home Phone _____

Occupation(s) _____

Business Phone _____

Husband's Cell Phone _____

Wife's Cell Phone _____

E-mail _____



Estate Balance Sheet

Residence \$ _____
Other Real Estate \$ _____
Business Interests \$ _____
Securities \$ _____
Bank Deposits \$ _____
Notes/Accts. Recv. \$ _____
Annual Income \$ _____

Life Insurance \$ _____
Personal Effects \$ _____
Other Assets \$ _____
Total Assets \$ _____
Less Liabilities \$ _____
Net Worth \$ _____



Accountant _____ City _____

Life Insurance Agent _____ City _____

Investment Advisor/Broker _____ City _____



CHILDREN

Child #1 Deceased Birth date Spouse # of children
_____ _____ _____ _____

Social Security # _____ Address _____

Phone _____ (Home) _____ (Cell)

Child #2 Deceased Birth date Spouse # of children
_____ _____ _____ _____

Social Security # _____ Address _____

Phone _____ (Home) _____ (Cell)

Child #3 Deceased Birth date Spouse # of children
_____ _____ _____ _____

Social Security # _____ Address _____

Phone _____ (Home) _____ (Cell)

Child #4 Deceased Birth date Spouse # of children
_____ _____ _____ _____

Social Security # _____ Address _____

Phone _____ (Home) _____ (Cell)

Child #5 Deceased Birth date Spouse # of children
_____ _____ _____ _____
Social Security # _____ Address _____
Phone _____ (Home) _____ (Cell)

Child #6 Deceased Birth date Spouse # of children
_____ _____ _____ _____
Social Security # _____ Address _____
Phone _____ (Home) _____ (Cell)

Trustees & Executor: After your spouse, who would you like to be the Successor Trustee of your Trust and Executor of your Will?

Name

Address: _____

Phone: _____ (Home)

_____ (Cell)

Name

Address: _____

Phone: _____ (Home)

_____ (Cell)

Agents for Power of Attorney: After your spouse, who would you like to be the Agents for your Financial Management Power of Attorney & your Advance Health Care Directive (health care power of attorney)? (You can have as many agents as you want. On the Financial Power of Attorney, 2 people can work jointly but on the Health Care—only 1 person at a time to be your agent.

Name

Address: _____

Phone: _____ (Home)

_____ (Cell)

Name

Address: _____

Phone: _____ (Home)

_____ (Cell)

Name

Address: _____

Phone: _____ (Home)

_____ (Cell)

Attach additional sheet if necessary

STATUTORY PROBATE FEES TO BE AVOIDED WITH A LIVING TRUST

The State of California has established the minimum cost of probate which is set forth in the chart below. However, it is most unusual to complete the probate process at such a low fee because this chart does not include extraordinary fees granted by the Court for sales of assets during probate, preparation of death tax return (Form 706), litigation expenses, etc. The Attorney and Executor share the Probate fees as shown below.

Probate Assets	Probate Fees
100,000	\$ 8,000
200,000	\$ 14,000
300,000	\$ 18,000
400,000	\$ 22,000
500,000	\$ 26,000
600,000	\$ 30,000
700,000	\$ 34,000
800,000	\$ 38,000
900,000	\$ 42,000
1,000,000	\$ 46,000
1,500,000	\$ 56,000
2,000,000	\$ 66,000
3,000,000	\$ 86,000
4,000,000	\$106,000
*5,000,000	\$126,000