

CONFIDENTIAL

PERSONAL AND FAMILY PROFILE

Full Name (Please provide any variations or aliases used)

Husband _____

Wife _____

Home Address and Telephone

Business Address and Telephone

Husband _____

Wife _____

Place of Birth and Date

Husband _____ Wife _____

Social Security Number

Husband _____ Wife _____

Are You Citizens of the United States?
If Not, Where?

Husband Yes No

Wife Yes No

Husband _____ Wife _____

Resident of California Since

Husband _____ Wife _____

Place and Date of Marriage

Physician Name and Address

Husband _____

Wife _____

Estimated Net Worth at Date of Marriage

Husband \$ _____ Wife \$ _____

Estimated Net Worth Upon Arrival in California

Husband \$ _____ Wife \$ _____

Provide Names of States (Other Than California) in Which You Have Resided During Your Marriage and Give Dates of Residency

Business or Occupation

Husband _____

Wife _____

Give a Brief History of Your Business Career From Date of Marriage to Present

Husband _____

Wife _____

Who Referred You to Our Office?

CHILDREN

Name	Address	Phone Number	Date of Birth	From Current (C) or Prior (P) Marriage

Deceased Children, If Any

Location of Safe Deposit Box

Location of Other Important Papers

ASSETS

Real Property

(How title is held, when acquired, and cost.
Include address and general description.)

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Cash

Location of Deposits	Account Numbers	As Joint Tenants?
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

Securities

Name of Company	Number of Shares	Title to Shares in Names of	As Joint Tenants?
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

Tangible Personal Property

(Personal effects, household furnishings, cars, etc.)

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Life Insurance			
Name of Company	Face Amount	Name of Beneficiary	Owner of Policy

Death and Retirement Benefits
(Pensions, IRAs, etc.)

Current Estimated Net Worth, Excluding Life Insurance Husband \$ _____ Wife \$ _____

OTHER INTERESTS OR EXPECTANCIES

Interests in Trust
(Powers of Appointment)

Expected Inheritances or Gifts

Annuities

Is it possible that an inheritance will cause your combined estate to be worth over \$23,160,000 (goes down by 1/2 on January 1, 2026)? Yes No

GIFTS YOU HAVE MADE (OVER the annual exclusion (\$15,000 after 2017, \$14,000 from 2013-2017, \$13,000 for 2009-2012, \$12,000 for 2006-2008, \$11,000 several years prior and \$10,000 before that))

Outright

In Trust

PLEASE LIST PERSONS OR TRUST DEPARTMENTS THAT YOU WOULD SELECT AS:

Guardians (For Minor Children)

Executors of Will

Trustees of Trust (If Applicable)