

CONFIDENTIAL

**PERSONAL AND FAMILY PROFILE
(single)**

Full Name (Please provide any variations or aliases used)

Home Address and Telephone

Business Address and Telephone

Place of Birth and Date

Social Security Number

Are You a Citizen of the United States? Yes No
If Not, Where?

Resident of California Since

Physician Name and Address

Business or Occupation

Who Referred You to Our Office?

CHILDREN

Name	Address	Phone Number	Date of Birth

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.)

Cash

Location of Deposits

Account Numbers

Securities

Name of Company

Number of Shares

Title to Shares in Names of

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

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

\$ _____

OTHER INTERESTS OR EXPECTANCIES

Interests in Trust
(Powers of Appointment)

Expected Inheritances or Gifts

Annuities

Is it possible that an inheritance will cause you to have an estate worth over \$5,500,000 if single? Yes No

GIFTS YOU HAVE MADE (OVER the annual exclusion (\$15,000 after 2017, \$14,000 for 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)