



Contact 112 W. 34th Street, 18th Floor New York, NY 10120 (914) 228-7448
Information: 101 N. Tryon Street Suite 112 and 6000 Charlotte, NC 28246 (704) 906-6249

Thank you for choosing Parisi, Coan & Saccocio, PLLC to assist you with your Estate Planning Needs. The information contained in this questionnaire will allow us to work together to develop a comprehensive plan based on your goals.

Please fill out the below information to the best of your ability. The information provided will be kept confidential, unless you authorize its release to others. Please note however, that if you and your significant other are both engaging the services of Parisi, Coan & Saccocio, PLLC, any and all information shared by either one of you will be treated as common knowledge to be shared among all of us, but confidentiality will remain with regard to any third party.

Date: _____ Referral Source: _____

YOUR PERSONAL INFORMATION:

Full Legal Name: _____

Date of Birth: _____ US Citizen? Yes No, Country of Citizenship _____

Address: _____

Primary Phone: _____ Alternate Phone: _____

Primary Email: _____ Alternate Email: _____

Occupation: _____ Employer: _____ Income: _____

Marital Status: Single Married Legally Separated Divorce Widowed Other: _____

SPOUSE'S PERSONAL INFORMATION:

Full Legal Name: _____

Date of Birth: _____ US Citizen? Yes No, Country of Citizenship _____

Address: _____

Primary Phone: _____ Alternate Phone: _____

Primary Email: _____ Alternate Email: _____

Occupation: _____ Employer: _____ Income: _____

Marital Status: Single Married Legally Separated Divorce Widowed Other: _____

CHILDREN:

FULL LEGAL NAME:

DATE OF BIRTH:

RELATIONSHIP

Ours Mine Spouse's

Ours Mine Spouse's

Ours Mine Spouse's

YOUR ESTATE PLANNING OBJECTIVES:

Do you presently have a will? Yes (please provide copy) No

SPOUSE'S ESTATE PLANNING OBJECTIVES:

Do you presently have a will? Yes (please provide copy) No

FINANCIAL INFORMATION:

<u>ASSETS:</u>	JOINT PROPERTY	YOUR SEPARATE PROPERTY	SPOUSE'S SEPARATE PROPERTY
Cash and Bank Accounts	\$	\$	\$
Primary Residence	\$	\$	\$
<i>(Balance Owed)</i>	- (\$)	- (\$)	- (\$)
Other Real Estate	\$	\$	\$
Investments	\$	\$	\$
Personal Property	\$	\$	\$

<u>LIABILITIES:</u>	JOINT DEBTS	YOUR SEPARATE DEBTS	SPOUSE'S SEPARATE DEBTS
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

LIFE INSURANCE: If there are applicable life insurance policies, please provide information with regard to the policy and beneficiary designation information below

1. _____
2. _____
3. _____

RETIREMENT BENEFITS: If there are applicable retirement plans, please provide information with regard to the plan and beneficiary designation below

1. _____
2. _____
3. _____

<u>OTHER INTERESTS:</u>	YOU		SPOUSE	
Are you a beneficiary under any trust? <i>(If yes, provide copy)</i>	Yes	No	Yes	No
Are you a Trustee under any trust? <i>(If yes, provide copy)</i>	Yes	No	Yes	No
Are you likely to receive substantial inheritances in the future?	Yes	No	Yes	No

ADDITIONAL INFORMATION:

Please state any additional matters which have not already been covered:
