

MARRIED PRELIMINARY INFORMATION

(NOTE: For ALL names on this questionnaire, please use the full legal name or the name as you would prefer it to appear in your documents (e.g., it is most common to use full first names with middle initials))

LAST NAME: _____ SPOUSE LAST NAME: _____

FIRST NAME: _____ FIRST NAME: _____

MIDDLE: _____ MIDDLE: _____

JR., SR., II, III?: _____ JR., SR., II, III?: _____

BIRTH DATE: _____ BIRTH DATE: _____

SSN: _____ SSN: _____

HOME ADDRESS: _____

HOME CITY: _____ HOME STATE: _____ HOME ZIP: _____

COUNTY OF RESIDENCE: _____ HOME PHONE: _____

Send Mail Where? Home _____ Office _____ Other _____

Husband

Wife

OCCUPATION: _____

PLACE OF EMPLOY: _____

WORK ADDRESS: _____

CITY, STATE, ZIP: _____

WORK PHONE: _____

CELL PHONE: _____

FAX: _____

EMAIL: _____

May we e-mail draft documents to you rather than send by regular mail? Yes ___ No ___

NS Nance & Simpson, L.L.P.

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Houston, Texas 77057
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of Grandkids

CHILDREN:	(1)	AGE:	
address:	_____	_____	_____

phone:	_____		

	(2)	_____	_____
address:	_____		

phone:	_____		

	(3)	_____	_____
address:	_____		

phone:	_____		

	(4)	_____	_____
address:	_____		

phone:	_____		

	(5)	_____	_____
address:	_____		

phone:	_____		

Do any of your children or grandchildren have special needs? Yes ___ No ___ (If yes, indicate which children or grandchildren)

Is it reasonably possible for you to have or adopt additional children? Yes ___ No ___

Are all children the children of both the Husband and Wife? Yes ___ No ___ (If not, indicate who is the parent of the above listed children.)

Do you have a premarital agreement or other martial property agreement? Yes ___ No ___

How many years have you been married? _____

Are the Husband and Wife both U.S. Citizens? Husband: Yes ___ No ___ Wife: Yes ___ No ___

Are either of you currently a beneficiary of a trust (now in existence) created by someone else? Yes ___ No ___
(If yes, please provide us a copy of the relevant trust agreement)

Have either of you ever made a taxable gift in excess of the federal annual exclusion OR previously filed a federal gift tax return (Form 709)? Yes ___ No ___

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ASSET INFORMATION	VALUE	*COMMENTS (community or separate property?)
Life Insurance on Husband	_____	_____
Life Insurance on Wife	_____	_____
Husband's IRAs, 401(k)s, Profit Sharing, etc.	_____	_____
Wife's IRAs, 401(k)s, Profit Sharing, etc.	_____	_____
Residence	_____	_____
Other Real Estate	_____	_____
Stocks, Bonds, Mutual Funds	_____	_____
Cash, CDs, Savings, Checking	_____	_____
Notes Where People Owe You Money	_____	_____
Business Interests	_____	_____
Other	_____	_____
TOTAL ESTATE	_____	

*In the comments section above, in addition to any other comments, please indicate to the best of your ability whether the asset is community property or separate property, and if separate, whether it is the Husband's or the Wife's separate property. (Generally, Texas law presumes all property to be community property; but an asset is separate property if it can be proven to have been owned prior to marriage, acquired by gift or inheritance, or its acquisition can be traced back to a separate property source).

Did anyone refer you? Yes _____ No _____ If yes, whom may we thank? _____

Would you like for this referral source to be copied on correspondence? Yes ____ No ____

If you own a business, what legal entity is the business (e.g., sole proprietorship, corporation, partnership, LLC, etc.)?

What other topics would you like to discuss at your appointment?



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WHO DO YOU WANT TO NAME AS THE EXECUTOR OF YOUR ESTATE?

(Spouses normally name each other first. The Executor is the personal representative who will windup your affairs, pay remaining debts, and distribute property to the persons/trusts named in your Will.)

Husband

1. _____

Relationship: _____

2. _____

Relationship: _____

3. _____

Relationship: _____

Wife

1. _____

Relationship: _____

2. _____

Relationship: _____

3. _____

Relationship: _____

WHO DO YOU WANT TO NAME AS THE TRUSTEE OF THE TRUSTS CREATED UNDER YOUR WILL FOR YOUR SPOUSE AND CHILDREN (if applicable)?

(Spouses normally name each other first. The Trustee is the fiduciary in charge of holding, managing, investing and distributing trust property, and is often the same person(s) as your Executor. These fiduciaries should be the same in both Wills.)

Name(s)

1. _____

2. _____

3. _____

Relationship

WHO DO YOU WANT TO NAME AS GUARDIANS OF YOUR MINOR CHILDREN (if applicable)?

(These fiduciaries should be the same in both Wills. Two persons can serve together as long as they are a married couple.)

GUARDIAN

Name(s)

1. _____

2. _____

3. _____

Relationship

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WHO DO YOU WANT TO NAME AS AGENT ON YOUR STATUTORY DURABLE POWER OF ATTORNEY?

(This power of attorney is for financial and business matters. Spouses normally name each other first. This power of attorney gives the person or persons you name the power to sign your name if you are not able to do so. For instance, it can be used to transfer money, sign a deed, or sign a tax return.)

Husband

1. _____

Address: _____

2. _____

Address: _____

3. _____

Address: _____

Wife

1. _____

Address: _____

2. _____

Address: _____

3. _____

Address: _____

WHO DO YOU WANT TO NAME AS AGENT ON YOUR MEDICAL POWER OF ATTORNEY?

(Spouses normally name each other first.)

Husband

1. _____

Address: _____

Phone: _____

2. _____

Address: _____

Phone: _____

3. _____

Address: _____

Phone: _____

Wife

1. _____

Address: _____

Phone: _____

2. _____

Address: _____

Phone: _____

3. _____

Address: _____

Phone: _____



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