

**The Law Office of Kenneth S. Federman, LLC
Estate Planning Organizer**

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Enter Names....		
Date:		
Personal Information		
	Spouse 1	Spouse 2
Full Name		
"also known as"		
US Citizen?		
Home Address		
Date of Birth/Age		
Social Security No.		
Home Telephone		
Cell Phone		
Home eMail		
Home Fax		
Profession		
Office Address		
Office Phone		
Office eMail		
Office Fax		

<i>Enter Names....</i>				
<i>Date:</i>				
Assets - Cash, Investments				
Asset Description	Spouse 1	Spouse 1	Joint	Total
Totals	0	0	0	0

<i>Enter Names....</i>				
<i>Date:</i>				
<i>Assets - Real Estate, Business Interests, Retirement Funds</i>				
Asset Description	Spouse 1	Spouse 1	Joint	Total
Totals	0	0	0	0

<i>Enter Names....</i>				
<i>Date:</i>				
<i>Liabilities</i>				
Liability Description	Spouse 1	Spouse 1	Joint	Total
Totals	0	0	0	0

Enter Names....		
Date:		
Additional Information/1		
Item	Thomas	Beverly
Prior Gifts		
Prior Gift Tax Returns		
Existing Will		
Existing Trust(s)		
Prior Marriages/Property Settlements		
Children from Prior Marriages		
Foreign Assets/Signature Auth		
Gifts from foreign persons/trusts		
Long Term Care Ins		
Stock Broker		
Financial Planner		
CPA		
Life Insurance Agent		
Physician		

