

Our Comprehensive Planning Information Request

There is a list of the information we need as we give careful consideration to planning ideas and strategies that you should consider. If you can't assemble all this information at once, we can begin with what is readily available.

- Full name and date of birth
- List of family members, spouses, grandchildren with dates of birth
- State of domicile and primary residence address
- Specific list of planning goals (*including value of desired inheritance to children, annual cost of living requirements of clients—net of taxes and gifts, desired amount of assets to remain liquid, etc.*)
- Detailed list of assets (*with basis and ownership of each item broken down by his, hers, joint, etc.*) Any closely held businesses should be identified as “S”, “C”, Partnership, or LLC’s.
- Details on life insurance owned currently (*owner, beneficiary, annual premium, cash value, death benefit*)
- Prior personal income tax returns (*previous two years preferred*)
- Gift tax return (*most recent*) or reliable indication of how much lifetime exemption each spouse has used.
- Copies of wills and all codicils
- Copies of all trust instruments and amendments currently executed
- Details on privately owned corporations (*if any*) such as % ownership, etc. with two years of prior business tax returns and financial statements
- Buy-Sell Agreements (*with assumed price as of date of death for the buy-out*)
- Names, titles, and firm names of members on the planning team (*include short description of members’ role in planning*)
- List of any variables to be considered, such as incentive clauses to encourage behavior of heirs
- Special family considerations such as disabled child or family business succession issues