



Attorneys & Counselors at Law

Faithfully Serving God & Our Clients

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Personal Information Form

Our Mission Statement: To help protect our clients from unnecessary and expensive legal problems that can be prevented by proper planning, help clients preserve their assets and family relationships, and save taxes through effective planning and administration of the family estate.

Enclosed is a Personal Information Form. The next page contains the Initial Consultation Agenda and the Plan Design Agenda. If you decide that updates are necessary, or you would like to go forward in designing a custom plan to fit your needs, then our second meeting is the Plan Design.

The Family Information asks for basic information about you, your spouse (if applicable), and your children. The Financial Information asks for an outline of your assets. Please be as accurate as possible. Your consultation will focus on your needs based on the information we learn about you and your assets. If they are significantly undervalued, we may not be able to advise and suggest strategies that you should consider. If they are significantly overvalued, we may advise and suggest strategies you may not need.

Do your best to complete the information on the following pages, and if you have questions we will address them during your initial consultation meeting. If you have any existing estate planning documents that you want reviewed, please send those documents in advance of your meeting.

If you have any further questions, please call our office at 469-893-5337. Thank you and we look forward to meeting with you!

Enclosures

Name: _____

Primary Phone: _____

Who referred you to us or how did you hear of us? _____

Initial Consultation Agenda

What happens during the initial consultation? The initial consultation is a getting-acquainted period that usually lasts 1-2 hours. You can decide if you are comfortable having our firm create or update your plan. There is no charge for the initial consultation. The proposed initial consultation agenda:

1. We are going to spend the first few minutes getting to know each other as individuals.
2. Outline our approach to estate planning
3. Discuss **your** (not our firm's) estate planning:
 - ◆ Hopes and Dreams
 - ◆ Goals and Objectives
 - ◆ Fears
 - ◆ Aspirations

In order to most effectively accomplish this, we will ask you questions about your family, your financial situation, and together we will determine your major estate planning concerns.

4. We will explain the law that applies to your situation and answer your questions.
5. We will list plan options with fee ranges based on your family situation, your financial situation, and your goals and objectives as discussed during this meeting.

The next step is up to you.

Personal Information Form – Date: _____

Husband – Are you a US citizen? ___ Yes ___ No

Full Legal Name: _____

Other Names: _____

Date of Birth: _____ Work Phone: _____

Home Phone: _____ Cell Phone: _____

E-Mail Address: _____

US Veteran? ___ Yes Branch(es): _____ Years: _____

Wife – Are you a US citizen? ___ Yes ___ No

Full Legal Name: _____

Other Names (incl Maiden): _____

Date of Birth: _____ Work Phone: _____

Home Phone: _____ Cell Phone: _____

E-Mail Address: _____

US Veteran? ___ Yes Branch(es): _____ Years: _____

Address: _____

_____ Zip: _____

County: _____ **Date of Marriage:** _____

Children Information (including deceased; circle whether child of Husband, Wife, or Both)

Name and Gender	Child Date of Birth	His, Hers or Both?	Marital Status of Child	# of Children
_____	_____	H W B	_____	_____
_____	_____	H W B	_____	_____
_____	_____	H W B	_____	_____
_____	_____	H W B	_____	_____
_____	_____	H W B	_____	_____
_____	_____	H W B	_____	_____

Do any of your children have special needs? _____ (If yes, indicate which children above.)

Is it possible for you and your spouse to have or to adopt more children? _____

Is this the first marriage for: Husband _____ Wife _____

When were the following documents last updated?

Will _____ Trust _____

Asset List -- Approximate values are very important:	Joint	Husband	Wife
Value of family home	_____	_____	_____
Real estate (not your home)	_____	_____	_____
Mineral interests (oil, gas, coal, etc.)	_____	_____	_____
Natural Resources (timber, water rights)	_____	_____	_____
Stocks, Bonds, Mutual Funds, etc.	_____	_____	_____
Cash (Checking, Savings, CDs, etc.)	_____	_____	_____
Receivables (mortgages, notes, etc.)	_____	_____	_____
Life Insurance/burial plan death benefits	_____	_____	_____
Cash value of life insurance	_____	_____	_____
Jointly owned assets – non-spouse	_____	_____	_____
Miscellaneous assets & home contents	_____	_____	_____
Collectibles	_____	_____	_____
IRA, Pension, 401K Plans	X X X X X X X	_____	_____
Agricultural assets & animals	_____	_____	_____
Personal vehicles (auto, boat, aircraft)	_____	_____	_____
Intellectual property (copyright, trademarks)	_____	_____	_____
Business interests (Corp, LLC, Partnership)	_____	_____	_____
Annuities	_____	_____	_____
Jointly Owned Property (with others)	_____	_____	_____
Interests in Trusts, reporting stock options	_____	_____	_____
General POA held/released at death; 5&5 Powers	_____	_____	_____
<u>Liabilities</u>	Joint	Husband	Wife
Family home	_____	_____	_____
Credit and charge cards	_____	_____	_____
Automobile loans	_____	_____	_____
Bank loans	_____	_____	_____
Real estate mortgages	_____	_____	_____
Other obligations	_____	_____	_____
<u>Business Liabilities</u>			
Real estate mortgages	_____	_____	_____
Business loans	_____	_____	_____

Estate Planning Concerns

Tell us YOUR main objectives. Please check all that concern you.

- Control** property and assets while alive (without interference from outsiders).
- Take** care of self and loved ones upon incapacity.
- Give** what I have to whom I want, the way I want, when I want, and how I want.
- Protect** assets passed to beneficiaries from their creditors, lawsuit predators, and a beneficiary's spouse (in divorce).
- Don't** cause beneficiaries to become ineligible for programs to which they would otherwise be entitled because of assets passed to them.
- Minimize** professional fees and court costs while effectively administering my affairs.
- Save** every tax dollar possible.
- After** one death, surviving spouse needs to locate everything and know what to do.
- After** one death, surviving spouse should have immediate access to all of our assets.
- After** one death, protect surviving spouse from incapacity or inability to sign documents.
- Protect** the assets going to beneficiaries if the surviving spouse remarries.
- Concerned** with irresponsible beneficiaries receiving a large sum without instructions.
- Protect** what we/I leave to beneficiaries from divorce or their problem spouses.
- Protect** what we/I leave to beneficiaries from lawsuit predators.
- There** are children from a prior marriage.
- There** are minor beneficiaries or children who can't legally own assets.
- There** are beneficiaries with learning or medical issues.
- There** are beneficiaries who qualify for government benefits.
- Disinheriting** one or more children is necessary.
- There** are family members or heirs who can cause problems or possibly contest the plan.
- Unequal** distributions are necessary (different amounts to different beneficiaries).
- Child(ren)** has/have his or her/their name(s) on my/our assets.
- There** is the known likelihood of a beneficiary becoming incapacitated.
- Family Business** involves all or some of the children.
- Real estate** and/or business assets need to be divided among multiple beneficiaries.
- Plan for **out-of-state** real estate and/or business.
- Current estate plan was a "Do-it-Yourself" plan.
- Current estate plan was drafted by an attorney but was a basic or bare-bones plan.
- Current estate plan made prior to mid-2013.
- Current estate plan is from a state other than Texas.
- There are additional family members or assets since the last plan was drafted.
- Avoid** the court-supervised management of assets if I/we became incapacitated.
- Avoid** the court-supervised transfer of my/our assets upon death.
- Reducing** or avoiding taxes is important (estate, capital gains, etc.).
- Save taxes** on IRA distributions to beneficiaries.
- Bloodline** protection (keeping assets in the family lineage) is important.
- Protect** my/our assets if I am/we are ever sued or involved in a lawsuit.

Additional concerns you have: _____

