



**JAMES R. PORRITT**  
 Attorney  
 436 S. Broadway  
 Lake Orion, Michigan  
 (248) 693-1111  
 (248) 693-1112

**Confidential Personal Information  
 for Estate Planning**

[ \_\_\_\_\_ ]

**Individual**

*Husband*

*Wife*

Name \_\_\_\_\_

Also known as \_\_\_\_\_

Social Security No. \_\_\_\_\_

Birth date \_\_\_\_\_

U.S. citizen \_\_\_\_\_ Y \_\_\_\_\_ N \_\_\_\_\_ Y \_\_\_\_\_ N

Living parents \_\_\_\_\_

Former spouse \_\_\_\_\_

Business address \_\_\_\_\_

Telephone number \_\_\_\_\_

Fax number \_\_\_\_\_

E-mail address \_\_\_\_\_

Home address \_\_\_\_\_

County of residence \_\_\_\_\_

Date of marriage \_\_\_\_\_

**Children**

Living children (indicate children from prior marriages and adopted children)

<i>Name</i>	<i>Birth date</i>	<i>Social Security no.</i>	<i>No. of children</i>
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_____	_____	_____	_____
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_____	_____	_____	_____
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_____	_____	_____	_____
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_____	_____	_____	_____
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\_\_\_\_\_

\_\_\_\_\_

Deceased children \_\_\_\_\_

Living children of deceased children \_\_\_\_\_

Note: If there are no living children or grandchildren, list the brothers and sisters (living and deceased) of the husband and the wife.

**Agents and brokers**

Safe-deposit box	_____ Y	_____ N	Location _____
Accountant	_____ Y	_____ N	Name _____
Insurance agent	_____ Y	_____ N	Name _____
Stockbroker	_____ Y	_____ N	Name _____

**Confidential Property Information  
for Estate Planning**

[Date]

**Real estate** (including land contracts)

*Description*

(include owner: H—husband, W— wife, J—joint)	<i>Mortgage balance</i>	<i>Market value</i>
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

**Cash** (checking, savings, CD, money market, credit union)

<i>Location of account</i> (include owner: H, W, J)	<i>Amount</i>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

**Stocks and bonds** (if in a brokerage account, list firm name)

Listed securities (H) \_\_\_\_\_

\_\_\_\_\_  
Listed securities (W) \_\_\_\_\_

\_\_\_\_\_  
Listed securities (J) \_\_\_\_\_

\_\_\_\_\_  
Closely held (family) securities \_\_\_\_\_

**Life insurance** (include insured, insurance company, insurance type, owner, and beneficiary)

*Face amount*

\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_

**Retirement benefits** (list company) \_\_\_\_\_

\_\_\_\_\_  
IRA (list location, type [Roth, non-Roth], and amount) \_\_\_\_\_

**Miscellaneous**

Household furnishings, autos, collections \_\_\_\_\_

Money owed by others to you \_\_\_\_\_

Miscellaneous (trusts, etc.) \_\_\_\_\_

Expected inheritances \_\_\_\_\_

List all gifts made by you over \$3,000 in value (date and beneficiary) \_\_\_\_\_

\_\_\_\_\_  
Any gift tax return filed \_\_\_ Y \_\_\_ N Years filed \_\_\_\_\_

List significant debts or obligations other than mortgages listed above \_\_\_\_\_

**TESTAMENTARY TRUST**

*A Testamentary Trust is one which would not become effective until the death of the testator. It will provide for the use of funds for the benefit of named Beneficiaries and describe the circumstances under which the Trustee*

*will make distributions and ultimately terminate and distribute the residue. If you choose to use this tool you'll need to name the beneficiaries (such as your children), the Trustee (the person who will hold and distribute the funds) and consider the type of circumstances you will want to trigger the use of the fund.*

Beneficiaries

Trustee \_\_\_\_\_  
Alternate Trustee

## PET TRUST

*A Pet Trust is a type of Testamentary Trust set up in order to provide for the upkeep and support of the Testator's Pet after the owner's passing. Aside from naming and describing the Pet, it can describe the diet, exercise regimen, and veterinary schedule the Owner wishes to have maintained. You will need to name and describe the Pet, the person you wish to have physical custody ( Caregiver ) and the person who will hold the fund (Trustee )*

Pet (Name )  
( Description , i.e. breed, size, color, distinguishing markings, weight )

Caregiver

Trustee

Diet, Exercise Regimen, Veterinary