

<b>BERNETICH, HATZELL &amp; PASCU, LLC</b> LAW OFFICES	1010 KINGS HIGHWAY SOUTH, BUILDING 2 CHERRY HILL, NEW JERSEY 08034  WEBSITE: WWW.ESTATEPLANLAWYER.COM
<b>ESTATE PLANNING – INQUIRY SHEET</b>	TELEPHONE (856) 795-3535      FACSIMILE (856) 795-3322

Today's Date: \_\_\_\_\_

NAME: \_\_\_\_\_ S.S. NO. \_\_\_\_\_ U.S. CITIZEN: YES  NO   
 SPOUSE: \_\_\_\_\_ S.S. NO. \_\_\_\_\_ U.S. CITIZEN: YES  NO   
 HOME ADDRESS: \_\_\_\_\_  
 OFFICE ADDRESS: \_\_\_\_\_  
 BIRTH DATE: \_\_\_\_\_ SPOUSE'S BIRTH DATE: \_\_\_\_\_  
 TELEPHONE: Home: \_\_\_\_\_ Office: \_\_\_\_\_ Cell: \_\_\_\_\_ FAX: \_\_\_\_\_  
 EMAIL ADDRESS(ES): \_\_\_\_\_

Names of Children (indicate if step-child) and other Dependents	Birth Date	Marital Status	Spouse's Name	Grandchildren (Attach list if necessary)

Do any individuals have special needs? \_\_\_\_\_ Yes \_\_\_\_\_ No

TYPE OF ASSET	DESCRIPTION (Please (i) list the value in appropriate columns to right; (ii) attach separate itemized lists as needed)	ASSET OWNED BY HUSBAND	ASSET OWNED BY WIFE	ASSET OWNED JOINTLY
REAL ESTATE residence, business, other				
SECURITIES stocks, bonds, mutuals				
CASH bank a/c's, receivables, money markets				
RETIREMENT ACCOUNTS				

BUSINESS INTERESTS								
PERSONAL EFFECTS								
OTHER ASSETS, POTENTIAL INHERITANCE, ETC.								
LIFE INSURANCE	Insured	Company Name	Cash Value	Beneficiary	Policy Nos.	Face Amount	Face Amount	Face Amount
DEBTS AND OBLIGATIONS								

Notes/Comments:

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