



GADZO LAW FIRM

PERSONAL INFORMATION FORM

CONFIDENTIAL

Step

1

Background Information

Trustee/Executor Information

Is there are a: TRUST WILL NO PLANNING (intestate)

Full Legal Name _____

Other names you use(d) _____ Prefer to be called _____

DOB _____ SSN# _____

Driver's Lic. # _____ State Issued: _____

Birthplace _____ Citizenship U.S. Other _____

Home Address _____

Home Phone _____ Mobile Phone _____

E-mail address _____

Single Married Widowed Divorced

If Married: Date _____ Place _____ Prenuptial Agreement? _____

If Widowed: DOD _____ Name of Deceased _____

If Divorced: Date _____ Name of Spouse _____

Are either of your parents still living? _____ Are either of your grandparents still living? _____

Descendant

Full Legal Name _____

Other names used _____

DOB _____ SSN# _____

Birthplace _____ Citizenship U.S. Other _____

Home Address _____

Are either of their parents still living? _____ Are either of their grandparents still living? _____

Step

2

Beneficiaries

Beneficiary 1

Full Legal Name _____

Relationship _____ DOB _____ Phone _____

Home Address _____

Beneficiary 2

Full Legal Name _____

Relationship _____ DOB _____ Phone _____

Home Address _____

Beneficiary 3

Full Legal Name _____

Relationship _____ DOB _____ Phone _____

Home Address _____

Beneficiary 4

Full Legal Name _____

Relationship _____ DOB _____ Phone _____

Home Address _____

Beneficiary 5

Full Legal Name _____

Relationship _____ DOB _____ Phone _____

Home Address _____

Beneficiary 6

Full Legal Name _____

Relationship _____ DOB _____ Phone _____

Home Address _____

Step	The Initial Meeting
3	

General Document Request

Before we can begin the process of administering/probating your loved one's estate, it is important for us to have a general understanding of the estate and its assets. If possible, please bring with you to the initial meeting the following documentation:

1. Copies of existing planning documents, including wills, trusts, powers of attorney, health care directives, etc.
2. Copies of all deeds to real estate owned by the descendant.
3. Copies of the most recent statements evidencing ownership of bank accounts, investment accounts, retirement accounts, and annuities.
4. Copies of any stock or bond certificates.
5. Pre or Postnuptial Agreement (if applicable).
6. Long-term care policies (if any).
7. Divorce Decree or Property Settlement Agreement for divorce under which continued obligations exist.
8. Last 3 years of personal income tax returns.
9. Last 3 years of any corporate, partnership, gift tax, estate tax, or trust tax returns.
10. Death Certificate (if issued).

Affirmation

The undersigned understands that the Gadzo Law Firm (the "Firm") will need to rely on the information supplied to process the descendant's estate. The undersigned also understands that inaccurate or incomplete information could negatively impact the administration/probate process. Consequently, if the Firm is retained, they will need to be provided with complete and accurate information.

Trustee/Executor: _____

Date: _____