



Providing Peace of Mind by Solving Problems with Integrity & Compassion

Thank you for the trust you have placed in **JUPITER LAW CENTER** by contacting us to discuss/review your *Estate & Business Planning, Probate and/or Trust Administration* needs. Please complete the attached *Confidential Client Information Form* as accurately and thoroughly as possible. The information you provide will assist us in properly assessing your specific needs/wants so that we can have a productive first meeting. **We do not sell or disclose the information that you provide to us.**

Many people think they don't need, or can't afford an attorney to do *Estate & Business Planning* or don't believe that it would be necessary or beneficial for them. Many others think that their family will be exempt from the *Probate* process simply because they have already named specific beneficiaries in their *Will* or *Trust* or other financial accounts. At our first meeting, we will explain to you in simple and easy-to-understand language, *not Legalese*, why these beliefs often aren't accurate and how by retaining us you'll be better able to protect and transfer your "*nest egg*" to your loved ones or, if necessary, navigate the *Probate/Trust Administration* process.

What is unique about our firm is that clients usually expect their experience with a law firm to be stressful, antiseptic and unpleasant, but we often surprise them with the warmth and accessibility of our team and services - and even humor. At **JUPITER LAW CENTER**, we take great pride in building longstanding relationships with each of our clients. Ultimately, we hope to serve you and your family and become your lawyer for life.

Sincerely,

The Attorneys and Staff at
JUPITER LAW CENTER

*RiverPlace Professional Center
1003 W. Indiantown Road • Suite 210
Jupiter, Florida 33458-6851
(561) 744 - 4600
jupiterlawcenter.com*



CONFIDENTIAL CLIENT INFORMATION FORM (ESTATE PLANNING & PROBATE ESTATES)

DATE _____ WHO MAY WE THANK FOR REFERRING YOU? _____
FINANCIAL ADVISOR _____

CLIENT'S OR PR'S INFORMATION

FULL LEGAL NAME _____ a/k/a _____
FIRST M.I. LAST

ADDRESS _____
STREET ADDRESS CITY STATE ZIP

COUNTY _____ EMAIL ADDRESS _____

TELEPHONE # Business () Home () Cell ()

AGE _____ DATE/PLACE OF BIRTH _____ SOCIAL SECURITY # _____

EMPLOYER _____

EMPLOYER'S ADDRESS _____
STREET ADDRESS CITY STATE ZIP

Position/Title _____ How Long Employed _____

MARITAL STATUS [] Single [] Divorced [] Married [] Widowed [] Unmarried/Living Together

DO YOU HAVE A PRENUPTIAL/POSTNUPTIAL AGREEMENT WITH YOUR SPOUSE? [] Yes [] No

HAVE YOU EVER HAD A WILL OR TRUST? Will: [] Yes [] No Trust: [] Yes [] No

ARE YOU A U.S. CITIZEN? [] Yes [] No

ANY KNOWN PROBLEMS WITH MEMORY OR UNDERSTANDING? [] Yes [] No

SPOUSE/SIGNIFICANT OTHER'S/DECEDENT'S INFORMATION EMAIL _____

FULL LEGAL NAME _____ a/k/a _____
FIRST M.I. LAST

TELEPHONE # Business () Cell ()

AGE _____ DATE/PLACE OF BIRTH _____ SOCIAL SECURITY # _____

EMPLOYER _____

EMPLOYER'S ADDRESS _____
STREET ADDRESS CITY STATE ZIP

Position/Title _____ How Long Employed _____

MARITAL STATUS [] Single [] Divorced [] Married [] Widowed [] Unmarried/Living Together

DO YOU HAVE A PRENUPTIAL/POSTNUPTIAL AGREEMENT WITH YOUR SPOUSE? [] Yes [] No

HAVE YOU EVER HAD A WILL OR TRUST? Will: [] Yes [] No Trust: [] Yes [] No

ARE YOU A U.S. CITIZEN? [] Yes [] No

ANY KNOWN PROBLEMS WITH MEMORY OR UNDERSTANDING [] Yes [] No

CHILDREN

Full Legal Name & Address (if not living w/client) Marital Status Date of Birth/Age (J) Joint, (H) Husband's or (W) Wife's

(M)arried or (S)ingle

Table with 4 columns: Full Legal Name & Address, Marital Status, Date of Birth/Age, (J) Joint, (H) Husband's or (W) Wife's. Contains 5 rows of blank lines for data entry.

DOES YOUR SPOUSE, ANY OF YOUR CHILDREN, OR ANY OF YOUR GRANDCHILDREN, HAVE SPECIAL NEEDS OR AT RISK FOR BECOMING SERIOUSLY ILL OR DISABLED? [] Yes [] No

If yes, please explain: _____

FINANCIAL INFORMATION

THE TOTAL VALUE OF ALL ASSETS LISTED BELOW IS MORE LESS THAN \$11.58 MILLION.

\$ _____ PRIMARY RESIDENCE (Mortgage Balance = \$ _____) HOW TITLE HELD _____
ADDRESS: _____

\$ _____ ADDITIONAL PROPERTY #1 (Mortgage Balance = \$ _____) HOW TITLE HELD _____
ADDRESS: _____

\$ _____ ADDITIONAL PROPERTY #2 (Mortgage Balance = \$ _____) HOW TITLE HELD _____
ADDRESS: _____

\$ _____ ADDITIONAL PROPERTY #3 (Mortgage Balance = \$ _____) HOW TITLE HELD _____
ADDRESS: _____

\$ _____ VACANT LAND (Mortgage Balance = \$ _____) HOW TITLE HELD _____
ADDRESS: _____

\$ _____ NAME OF BUSINESS #1 _____
ADDRESS: _____

\$ _____ NAME OF BUSINESS #2 _____
ADDRESS: _____

\$ _____ ANNUITIES

\$ _____ CERTIFICATE OF DEPOSIT(S)

\$ _____ MONEY MARKET(S)

\$ _____ CHECKING ACCOUNT(S)

\$ _____ SAVING ACCOUNT(S)

\$ _____ INDIVIDUAL RETIREMENT ACCOUNT(S)

\$ _____ 401k/403b

\$ _____ SECURITIES (STOCKS/BONDS)

\$ _____ PROMISSORY NOTE(S) (owed to you or payable by you)

\$ _____ LIFE INSURANCE: WHOLE TERM _____ (How long?)

\$ _____ AUTOMOBILE(S)/MOTORCYCLES/OTHER MOTORIZED VEHICLES (How many?)

\$ _____ BOAT(S) (How many?)

\$ _____ COLLECTIONS: _____

\$ _____ JEWELRY

\$ _____ OTHER - PLEASE DESCRIBE: _____

\$ _____ OTHER - PLEASE DESCRIBE: _____

If there is any other issue relevant to your assets or *Estate Planning* needs, please detail such issue(s) below

Check here if you want to receive our quarterly e-Newsletter (Note: we do not sell or disclose our client's information)