



***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  
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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, OR DO ANY OF YOUR CHILDREN OR GRANDCHILDREN, HAVE SPECIAL NEEDS OR ARE ANY 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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

