

**ADDITIONAL INFORMATION SHEET FOR A SINGLE PERSON**

The following questions allow us to make some basic decisions about your need for estate planning as well as provide an important source of information in the event of your death. This information will be kept in confidence. If you do not want to provide the information, regular wills can be written without it.

(1) State your occupation:

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Name and address of employer or former employer:

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(2) Are you eligible for any pension, profit sharing, savings, stock bonus, insurance or other plan through your employment? \_\_\_\_\_ If yes, please explain:

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(3) If you have ever been in the military, please state the branch and dates of service:

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(4) Have you given anyone large gifts, over \$10,000 in any calendar year? \_\_\_\_\_  
If yes, please state when and to whom. Attach an additional sheet of paper if necessary.

Person Receiving Gift	Date	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

(5) Miscellaneous personal information and other instructions:

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## BALANCE SHEET

(6) The simplified balance sheet below is for the purpose of instructing the attorney about the approximate size of your estate and the title to the property. The attorney is entitled to rely on it for that purpose but to use it for no other purpose. It is confidential. This information is necessary to advise you about death taxes and estate planning.

INSTRUCTIONS: If you owe against a particular asset, subtract the debt from the fair market value and write down only your equity. Please use the following initial formats to indicate how you hold title in the parentheses below: MNO for "my name only," JT for "joint tenancy" (usually "or"), CP for "Community Property" (usually "and").

Example: House at 212 Yale Avenue, Claremont CA 91711 (MNO) \$100,000.00

For anything else, put a reference number in the parentheses and explain it in the NOTES section. If you do not have adequate room, please add a sheet.

### REAL ESTATE

### TITLE EQUITY

- |                   |         |       |
|-------------------|---------|-------|
| 1. House at _____ | (_____) | _____ |
| 2. Other? _____   | (_____) | _____ |
| 3. Other? _____   | (_____) | _____ |

PLEASE BRING COPIES OF ALL DEEDS TO YOUR INITIAL APPOINTMENT

### BANK ACCOUNTS

- |                      |         |       |
|----------------------|---------|-------|
| 1. Checking at _____ | (_____) | _____ |
| 2. Checking at _____ | (_____) | _____ |
| 3. Savings at _____  | (_____) | _____ |
| 4. Savings at _____  | (_____) | _____ |

### STOCKS AND BONDS

- |                          |         |       |
|--------------------------|---------|-------|
| 1. _____ shares of _____ | (_____) | _____ |
| 2. _____ shares of _____ | (_____) | _____ |
| 3. _____ shares of _____ | (_____) | _____ |

VEHICLES

Year	Make	California License		
1. _____	_____	_____ (_____)	_____	_____
2. _____	_____	_____ (_____)	_____	_____
3. _____	_____	_____ (_____)	_____	_____

LIFE INSURANCE

Company	Policy Number	Face Value	Cash Value	Type
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

OTHER

1. Collection of _____	(_____)	_____
2. Receivable from _____	(_____)	_____
3. Antiques _____	(_____)	_____
4. Jewelry _____	(_____)	_____
5. Investment in _____	(_____)	_____
6. _____	(_____)	_____
7. _____	(_____)	_____
8. _____	(_____)	_____
TOTAL		_____

DEBTS (not subtracted from value to state equity above)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

TOTAL \_\_\_\_\_

NOTES:

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