

# GIBSON & TUTTLE

Guy R. Gibson  
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## A LAW CORPORATION

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Howard G. Gibson  
(1921 - 1986)

Thank you for your interest in our legal services. In order to assist in the preparation of your estate plan, please fill in as much information as possible. If the question does not apply, please mark "N/A"

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### PERSONAL INFORMATION

Name (Client 1) \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Social Security No.: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Marital Status: \_\_\_\_\_ Occupation/Employer: \_\_\_\_\_

Name (Client 2): \_\_\_\_\_

Address (If different from Client 1): \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Social Security No.: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Occupation/Employer: \_\_\_\_\_

How did you hear about our firm? \_\_\_\_\_

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### FAMILY INFORMATION

Child's Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Child's Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Child's Name: \_\_\_\_\_ Birth Date: \_\_\_\_\_

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**QUESTIONS**

What goals do you want to accomplish with your estate plan? \_\_\_\_\_

\_\_\_\_\_

Have you ever had a Will, Trust, Power of Attorney or Advanced Health Care Directive? Please

explain: \_\_\_\_\_

\_\_\_\_\_

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**ASSETS TO PROTECT**

REAL ESTATE/TIMESHARES:

Address: \_\_\_\_\_

Address: \_\_\_\_\_

STOCKS, BONDS, MUTUAL FUNDS:

\_\_\_\_\_

\_\_\_\_\_

401K, IRA's OR RETIREMENT PLANS:

\_\_\_\_\_

\_\_\_\_\_

LIFE INSURANCE:

\_\_\_\_\_

\_\_\_\_\_

OTHER ASSETS:

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**MISCELLANEOUS**

Do you have a C.P.A.? If yes, please provide the name, address and phone number:

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Do you have a financial Planner? If yes, please provide the name, address and phone number:

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Other pertinent information:

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