



Advanced Markets *Estate Planning*

Client information

Name: _____
DOB/Age: _____
Citizenship: _____
State: (Residence / Issue): _____
Phone: _____
Email: _____

Client's Risk Class Option

- Super Preferred Non Smoker (SPNS)
- Preferred Non Smoker (PNS)
- Standard Plus Non Smoker (StdPNS)
- Standard Non Smoker (StdNS)
- Preferred Smoker (PS)
- Standard Smoker (SS)

Producer information

Name: _____
Company: _____
Address: _____
City, state, zip: _____
Phone: _____
Email: _____

Spouse's/Family information

Spouse Name: _____
DOB/Age: _____
Citizenship: _____
Number of Children: _____
Number of Married Children: _____
Number of Grandchildren: _____

Spouse's Risk Class Option

- Super Preferred Non Smoker (SPNS)
- Preferred Non Smoker (PNS)
- Standard Plus Non Smoker (StdPNS)
- Standard Non Smoker (StdNS)
- Preferred Smoker (PS)
- Standard Smoker (SS)

Deceased Spousal Unused Exemption (DSUE) if applicable

Year of Spouse's Death: _____
Exemption Available at Death: _____
Amount Used at Death: _____
Amount Passed to Surviving Spouse: _____

Financial information

Clients' Annual Salary: _____
Spouse's Annual Salary: _____
Other income: _____
Total Adjusted Income: _____
Income Tax Bracket: _____ %

Current Estate

Any Wills or Trusts in place? _____
Credit Shelter Trust established? _____
Annual Exclusion Amount: (Used) _____
Current Annual Taxable Gifts: _____
Client's Remaining Applicable Exclusion: _____
Spouse's Remaining Applicable Exclusion: _____
Client's prior Taxable Gifts: _____
Client's Gift Tax Paid: _____
Spouse's prior Taxable Gifts: _____
Spouse's Gift Tax Paid: _____

Distribution of assets, liabilities, and net worth

	Asset amount (\$)	Growth rate (%)	Owner		
			Client	Spouse	Joint
Assets					
Checking & savings accounts (including Money Market Fund and CD's)					
Bonds and bond funds					
Stocks and mutual funds					
Real estate					
Annuities					
Business interests					
Miscellaneous (personal property, autos, boats, planes, art, jewelry, collectables)					
Retirement plans (401(k), IRA's, etc.)					
Life insurance death benefit					
Other Assets					
Total assets					
Liabilities					
Real estate mortgages					
Loans					
Other obligations					
Total liabilities					
Total net worth					

For more information or help with this fact finder please contact an
Advanced Markets Consultant at 888-266-7498, option 3.

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