



# Estate Planning Concepts

## Household Information

PERSON A

\_\_\_\_\_  
First Name                      Last Name

Male                      \_\_\_\_\_  
 Female                      Date of Birth

PERSON B

\_\_\_\_\_  
First Name                      Last Name

Male                      \_\_\_\_\_  
 Female                      Date of Birth

ADDRESS

\_\_\_\_\_  
Street

\_\_\_\_\_  
City                                      State                                      Zip

\_\_\_\_\_  
Email Address

Married                       Domestic Partners                       Single



## Your Estate Today

Current Estate: \$ \_\_\_\_\_

Existing Life Insurance:  
(Inside Client's Estate) \$ \_\_\_\_\_

Years to Project: \_\_\_\_\_ Years

Growth Rate: \_\_\_\_\_ %

Transfer Costs: \_\_\_\_\_ %

## Prior Gifts

### Person A

### Person B

Prior Taxable Gifts: \$ \_\_\_\_\_

Gift Taxes Paid: \$ \_\_\_\_\_

DSUEA\* \$ \_\_\_\_\_

Prior Taxable Gifts: \$ \_\_\_\_\_

Gift Taxes Paid: \$ \_\_\_\_\_

DSUEA\* \$ \_\_\_\_\_

\*Deceased Spousal Unused Exclusion Amount

State of Residence for Inheritance Taxes \_\_\_\_\_

Federal Inflation Rate for Applicable Exclusion Amount \_\_\_\_\_ %

Notes