BARR & BARR ATTORNEYS
318-C Diablo Road
Danville, CA 94526
Phone: (925) 314-9999
Fax: (925) 314-9960

Please bring the following documents to your first appointment:

1. A copy of your old will or trust, if applicable;
2. A copy of the Grant Deed (including the legal description) to any real estate you own;
3. A copy of this form, if you haven't already sent it to us;
4. Your check book, if you would like us to get started immediately. There is no charge for the initial appointment if you decide not to hire us. If you choose to hire us, we will give you an estimate of our fees and sign a written fee agreement. We require a deposit of one-half of the estimated fees before we begin working;
5. Prior to your appointment, please read the "Estate Planning Questions" section on our website to familiarize yourself with some of the issues we will discuss in our first meeting.

PERSONAL INFORMATION

Name: ___________________________________ Birthdate: _______________

Spouse's name: ___________________________ Birthdate: _______________

Mailing Address: ____
____

Home Phone: (______) ___________________________
Work Phone: (______) ___________________________

Email:____

Social Security Number - His:________________ Hers:__________________

Marriage Date:_________________ Place of Marriage: ______________________

Prior Marriage - Husband: Yes_____ No______
Wife: Yes_____ No______

Occupation - His:____

Occupation - Hers:____

Are you and your spouse U.S. Citizens? Yes/No

Children (Please indicate if any children are from a prior marriage or if any children are deceased):

Name:	Birthdate:	Residence, City and State	Marital Status
____________________	__________	________________	_____
____________________	__________	________________	_____
____________________	__________	________________	_____

ASSETS

REAL ESTATE

Please list each piece of real property by address, description (i.e. primary residence, secondary residence, land, vacation home, rental property, commercial property) and asset value.

	Address	Description	Value
1.			
2.			
3.			
4.			

BANK ACCOUNTS

Please list by Bank and Account Number, type (i.e. checking, savings, CD, money market) and value.

	Bank and Account Number	Type	Value
1.			
2.			
3.			
4.			

INVESTMENT

Please list by Bank/Broker and Account Number, type (i.e. bonds, common stock, mutual fund, Ltd. Partnership, preferred stock, etc.) and value.

	Bank/ Broker and Account Number	Type	Value
1.			
2.			
3.			
4.			

RETIREMENT

Please list by Bank/Broker and Account Number, type (i.e. 401k, 403b, IRA, Qualified Plan, SEP/IRA, etc.) and value.

	Bank/ Broker and Account Number	Type	Value
1.			
2.			
3.			
4.			

INSURANCE

Please list by Insurance Company and Policy Number, type (i.e. term policy, whole life policy, universal life policy, variable life policy) and value.

	Insurance Company and Policy Number	Type	Value
1.			
2.			
3.			
4.			

BUSINESS

Please list by Name, type (i.e. general partnership, limited partnership, C corporation, S corporation, sole proprietorship, LLC, etc.) and value.

Name of Company	Type	Value
1.		
2.		
3.		
4.		

OTHER

Please list other assets of significant value by type (i.e. boats, collectibles, automobiles, etc.) and value.

Type	Value
1.	
2.	
3.	
4.	

LIABILITY

Please list all debts and liabilities by type (i.e. mortgage, credit line, personal loan, other loan, etc.) and amount.

Type	Amount
1.	
2.	
3.	

PREVIOUS ESTATE PLANNING

Do you currently have a will or trust?

Has your will or trust ever been amended?