

Living Trust Consultation

Personal Information Needed:

Husband's Legal Name and Husband's "Signature Name"

Husband's Date of Birth and Social Security Number

Wife's Legal Name and Wife's "Signature Name"

Wife's Date of Birth and Social Security Number

Mailing Address Including City, State, and Zip Code

Children's Legal Names, Dates of Birth, and Social Security Numbers

Client Asset Information Needed for Consultation

For the consultation you will need to bring the following information. Please be sure to assess a fair market value on all assets.

1. Checking Accounts
2. Savings Accounts
3. Certificates of Deposit Accounts
4. Brokerage Accounts
5. Money Market Accounts
6. Individual Stocks and/or Bonds held
7. Real Estate (Husband, Wife, or Joint Ownership)
8. General or Limited Partnership Interest
9. Life Insurance Policies
10. IRA/Tax Deferred Annuity/401(k)/405(b) Information
11. Closely held Businesses (C or S Corp., Sole Proprietorship, LLC)

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Jackson E. "Pete" Fields, Jr.
The Fields Law Firm, P.A.
110 Liberty Drive, Suite 202
Clemson, SC 29631
864-653-4090