

**CONFIDENTIAL**

**PERSONAL AND FAMILY PROFILE**

Full Name (Please provide any variations or aliases used)

Husband \_\_\_\_\_

Wife \_\_\_\_\_

Home Address and Telephone

Business Address and Telephone

Husband \_\_\_\_\_

Wife \_\_\_\_\_

Place of Birth and Date

Husband \_\_\_\_\_ Wife \_\_\_\_\_

Social Security Number

Husband \_\_\_\_\_ Wife \_\_\_\_\_

Are You Citizens of the United States?  
If Not, Where?

Husband  Yes  No

Wife  Yes  No

Husband \_\_\_\_\_ Wife \_\_\_\_\_

Resident of California Since

Husband \_\_\_\_\_ Wife \_\_\_\_\_

Place and Date of Marriage

Physician Name and Address

Husband \_\_\_\_\_

Wife \_\_\_\_\_

Estimated Net Worth at Date of Marriage

Husband \$ \_\_\_\_\_ Wife \$ \_\_\_\_\_

Estimated Net Worth Upon Arrival in California

Husband \$ \_\_\_\_\_ Wife \$ \_\_\_\_\_

Provide Names of States (Other Than California) in Which You Have Resided During Your Marriage and Give Dates of Residency

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Business or Occupation

Husband \_\_\_\_\_

Wife \_\_\_\_\_

Give a Brief History of Your Business Career From Date of Marriage to Present

Husband \_\_\_\_\_

Wife \_\_\_\_\_

Who Referred You to Our Office?

CHILDREN

Name	Address	Phone Number	Date of Birth	From Current (C) or Prior (P) Marriage

Deceased Children, If Any

Location of Safe Deposit Box

Location of Other Important Papers

**ASSETS**

**Real Property**

(How title is held, when acquired, and cost.  
Include address and general description.)

--

**Cash**

Location of Deposits	Account Numbers	As Joint Tenants?
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

**Securities**

Name of Company	Number of Shares	Title to Shares in Names of	As Joint Tenants?
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

**Tangible Personal Property**

(Personal effects, household furnishings, cars, etc.)

--



GIFTS YOU HAVE MADE (OVER the annual exclusion (\$13,000 after 2008, \$12,000 for 2006-2008, \$11,000 several years prior and \$10,000 before that))

Outright

In Trust

PLEASE LIST PERSONS OR TRUST DEPARTMENTS THAT YOU WOULD SELECT AS:

Guardians (For Minor Children)

Executors of Will

Trustees of Trust (If Applicable)