

**CONFIDENTIAL**

**PERSONAL AND FAMILY PROFILE  
(single)**

Full Name (Please provide any variations or aliases used)

Home Address and Telephone

Business Address and Telephone

Place of Birth and Date

Social Security Number

Are You a Citizen of the United States?       Yes    No  
If Not, Where?

Resident of California Since

Physician Name and Address

Business or Occupation

Who Referred You to Our Office?

**CHILDREN**

Name	Address	Phone Number	Date of Birth

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

**Securities**

Name of Company

Number of Shares

Title to Shares in Names of

**Tangible Personal Property**

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

Life Insurance			
Name of Company	Face Amount	Name of Beneficiary	Owner of Policy

**Death and Retirement Benefits**  
(Pensions, IRAs, etc.)

Current Estimated Net Worth, Excluding Life Insurance

\$ \_\_\_\_\_

**OTHER INTERESTS OR EXPECTANCIES**

Interests in Trust  
(Powers of Appointment)

Expected Inheritances or Gifts

Annuities

Is it possible that an inheritance will cause you to have an estate worth over \$5,000,000 if single?       Yes    No

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)