

B N A
THE LAW OFFICES OF

BORLA, NORTH & ASSOCIATES, P.C.

Thank you for selecting our office to assist you in your estate planning needs.

In preparation for your first appointment, please complete the information below and bring it with you to our office at the time of your first appointment.

PLEASE PRINT

Today's Date _____

Name:

Name:

Address

Home phone _____

Work phone _____

Cell phone _____

Fax number _____

E-mail _____

Marital status _____

Number of children _____

Child's name

Address

Age _____

Child's name

Address

Age _____

Child's name

Address

Age _____

ASSET VALUE LIST

ASSET	HUSBAND OWNS	WIFE OWNS	IN JOINT
Home	\$	\$	\$
Mortgage Balance	\$	\$	\$
2 nd Mortgage Balance	\$	\$	\$
Stocks	\$	\$	\$
Savings Account	\$	\$	\$
Certificate of Deposit	\$	\$	\$
IRA	\$	\$	\$
401 K	\$	\$	\$
Face Amount of Insurance Policy	\$	\$	\$
Other Real Estate	\$	\$	\$
Other Assets	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
TOTAL	\$	\$	\$

Assets owned individually, such as IRA's and life insurance policies, should be listed under the appropriate "Owner's" column. Jointly owned assets should be listed under the "In Joint" column. Please list an approximate value for each asset.

We suggest you also bring with you the deed to any real estate you own and any other documents you would like us to review.