Parsonage Vandenack Williams LLC
5332 S. 138th St., Suite 100
Omaha, Nebraska 68137

ESTATE PLANNING INFORMATION LIST

The accumulation of the following information will assist us in providing you with appropriate recommendations regarding your estate plan. The time you spend completing this form will greatly increase our efficiency and our ability to deliver appropriate advice and quality service to you. Please note that this information is protected by the attorney-client privilege and will be held strictly confidential. It will be used only in formulating recommendations for your estate plan and will not be revealed by us to any person or entity without your specific authorization.

1. Your Full Legal Name:
2. Your Spouse's Full Name, if any:
3. Your Date and Place of Birth with Citizenship:
4. Your Spouse's (if any) Date and Place of Birth with Citizenship:
5. Full Home Address with County:
6. All Contact Telephone Numbers:
7. Date and Place of Current Marriage, if any:
8. Do you have a premarital agreement regarding your Current Marriage?
9. Please list Names, Dates and Places of All Previous Marriages, if any:
10. Please list Names, Addresses, Dates of Birth of all Children and indicate whether each child is from a previous marriage or from your current marriage:
11. Do you expect to adopt or give birth to any children?
12. Please list Names and Dates of Birth of all Grandchildren and indicate each Grandchild's parents:
13. Please list Names and Addresses of all Charitable Beneficiaries:

14. Have you ever filed a gift tax return? (i.e. if you have made gifts greater than the annual exclusion).

15. Do you or your spouse have a power of appointment or other interest under a Will or Trust of another person?

16. If you or your spouse has any prospective inheritances, describe source and estimated amount and character of assets:

17. If you or your spouse are or were employed, give details of any retirement plan (pension, 401(k), profit sharing, IRA, or stock options) or other employee benefits to which you are or may be entitled:

18. If you or your spouse are self-employed or a member of a partnership or limited liability company, give details of any contracts or commitments to sell such interest at death or retirement, as well as any retirement plans or other benefits that will be payable by reason of your death:

19. If you or your spouse own stock in a closely-held corporation, give details of any stock redemption agreements, shareholder agreements, buy-sell agreements, stock options, salary continuation, or other deferred compensation plans that may be applicable to you:

20. Have you or your spouse signed any estate planning documents (i.e. Last Will and Testament, Trusts (i.e., revocable, irrevocable, or charitable), Durable Power of Attorney, Power of Attorney for Health Care, Living Will) and if so, list all that apply and to whom:

21. If you or your spouse has a safe deposit box, please provide the location of the safe deposit box and the person(s) authorized to obtain access to the safe deposit box:

22. While married, have you ever lived in any of the following states: Alaska, Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, or Wisconsin, and if so, please list which ones:

It is important that we know how your assets are titled and their approximate value so that we may provide appropriate recommendations regarding your estate plan. You may provide a separate financial statement, if available, with the understanding that if not otherwise specified on the financial statement, we would still like to know how your assets are titled.

If you formally engage us with regard to your estate planning, you will need to gather and provide us with items such as:

- You and, if married, your spouse's current occupation, current employer(s) and business contact information (i.e., business telephone number(s) and email addresses);
- A list of all of you and your spouse's assets, each of their estimated dollar value, and indicate how each asset is titled (i.e., in wife's name, in husband's name or jointly titled).
    - Assets include, cash and near cash assets (bank account balances, C.D.'s, money market accounts, etc.); Public Stocks, Bonds or Brokerage Accounts; Closely Held Stock or Business Interests (describe name, form (corporation, partnership, limited liability company, etc.), nature of business and your percentage of ownership); Retirement Plan Accounts (pensions, profit sharing, IRAs, 401(k), etc.); Interests in other Estates or Trusts; Real Estate (please indicate state in which real estate is located and whether your residence, vacation home, commercial property, farm/ranch land or other); Life Insurance (describe owner, insured, type of life insurance policy and amount of insurance); Personal Property/Collectibles (such as jewelry, vehicles, etc.); and all other Assets
- A list of all of you and your spouse's liabilities, with estimated dollar amounts and indicate whether they are secured or unsecured
- A list of you and your spouse's Income individually (i.e., annual salary, typical bonus, investment income, dividends, other income)