



ROSENBAUER LAW OFFICE

ESTATE PLANNING • TRUST ADMINISTRATION • PROBATE

Nick Rosenbauer, Attorney at Law

CONFIDENTIAL CLIENT INFORMATION FORM

Legal Name: _____

Address: _____

City, State, Zip Code: _____

Date of Birth: _____

US citizen? Yes No. If no, what nationality: _____

Business/Employment: _____

Telephone: (home) _____ (cell) _____

Email: _____

Prior Marriages?

Yes No. If yes, name of prior spouse: _____

How Terminated? Death Divorce Date: _____

CHILDREN:

None

DOB

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Number of grandchildren: _____ Range of Ages: _____

- | | <u>YES</u> | <u>NO</u> |
|--|--------------------------|--------------------------|
| • Any deceased children? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, name(s): _____ | | |
| If yes, survived by issue? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Any adopted children? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, name(s): _____ | | |
| • Do any of your beneficiaries have a learning disability, special educational, medical or physical needs? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do you think any of your beneficiaries have special problems with spouses, drugs, alcohol or handling money? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do you wish to disinherit any of your children, grandchildren or any other close relatives? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do you expect to inherit substantial assets (\$100,000+)? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do you want assets passing to your beneficiaries to be held in trust until a specific age or ages? | <input type="checkbox"/> | <input type="checkbox"/> |
| • Do you have any existing estate planning documents? | <input type="checkbox"/> | <input type="checkbox"/> |

- State any specific concerns that you have regarding the distribution of your estate:

- Do you believe your current estate plan correctly states your wishes after you pass away? Does your current plan address all of the concerns you have regarding your estate and your family? If not, where does your current plan fall short?



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CONFIDENTIAL CLIENT ASSET FORM

Client Name: _____

Please list the name, phone number, and company of the professionals you currently work with:

Financial Advisor _____

Accountant: _____

Cash Accounts (checking, savings, money market, CDs):

Institution	Type	Owner	Balance
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Stock Certificates or Bonds (in paper certificate form)

Company	# of Shares	Owner	Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Investment Accounts (stocks, bonds, mutual funds, NOT including retirement acts.)

Company	Type of Asset	Owner	Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Client Name: _____

Life Insurance

Company	Policy Type	Owner	Death Benefit
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Annuities (Not including annuities held within a retirement account)

Company	Annuitant	Owner	Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Retirement Accounts (IRA, 401k, 403b, etc)

Company	Type	Owner	Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Real Estate

Address	Owner	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____

Business Interests

Name of Business	Owner	Value
_____	_____	_____
_____	_____	_____

Automobiles/Boats/Campers/Trailers (with certificate of title)

Make/Model	Owner	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Driving Directions to The Rosenbauer Law Office, LLC:

7334 Tylers Corner Drive, Suite 450, West Chester, Ohio 45069

- Take I-75 to Exit 22 (Tylersville Road/Mason)
- Head West on Tylersville Road until you reach Tylers Place Blvd
- Turn Right on Tylers Place Blvd, heading North
- Our building is the “L” shaped building on your right (behind Sunoco)

