

Estate Planning Concepts

Household Information

| PERSON A | First Name | Last Name | | O Male O Female Date of Birth |
|----------|------------|---------------------|----------------------|--------------------------------|
| PERSON B | First Name | Last Name | | O Male O Female Date of Birth |
| ADDRESS | _ | | | |
| | Street | | | |
| | City | | State Email Address | <i>Σ</i> ip |
| | O Married | O Domestic Partners | O Single | |

| Your Estate Today | | | | | |
|--------------------------|----|--------|--|--|--|
| Current Estate: | \$ | _ | | | |
| Existing Life Insurance: | | | | | |
| (Inside Client's Estate) | \$ | _ | | | |
| Years to Project: | | Years | | | |
| Growth Rate: | | % | | | |
| Transfer Costs: | | % _ | | | |

Prior Gifts

| Person A | | Person B | | |
|------------------------------|-----------------------------|--------------|-----------|----|
| Prior Taxable Gifts: | \$ | Prior Taxabl | le Gifts: | \$ |
| Gift Taxes Paid: | \$ | Gift Taxes P | Paid: | \$ |
| DSUEA* | \$ | DSUEA* | | \$ |
| *Deceased Spousal Unused | Exclusion Amount | | | |
| State of Residence for Inho | eritance Taxes | | | |
| Federal Inflation Rate for A | Applicable Exclusion Amount | <u>%</u> | | |
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| Notes | |
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