

<b>BERNETICH, HATZELL &amp; PASCU, LLC</b> LAW OFFICES	1010 KINGS HIGHWAY SOUTH, BUILDING 2 CHERRY HILL, NEW JERSEY 08034  WEBSITE: WWW.ESTATEPLANLAWYER.COM  TELEPHONE (856) 795-3535      FACSIMILE (856) 795-3322
<b>ESTATE PLANNING – INQUIRY SHEET</b>	

Today's Date: \_\_\_\_\_

NAME: \_\_\_\_\_ S.S. NO. \_\_\_\_\_ U.S. CITIZEN: YES  NO   
 HOME ADDRESS: \_\_\_\_\_  
 OFFICE ADDRESS: \_\_\_\_\_  
 BIRTH DATE: \_\_\_\_\_  
 TELEPHONE: Home: \_\_\_\_\_ Office: \_\_\_\_\_ Cell: \_\_\_\_\_ FAX: \_\_\_\_\_  
 EMAIL ADDRESS(ES): \_\_\_\_\_

Names of Children (indicate if step-child) and other Dependents	Birth Date	Marital Status	Spouse's Name	Grandchildren (Attach list if necessary)

Do any individuals have special needs? \_\_\_\_\_ Yes \_\_\_\_\_ No

TYPE OF ASSET	DESCRIPTION <small>(Please (i) list the value in appropriate columns to right; (ii) attach separate itemized lists as needed)</small>	APPROX. CURRENT MARKET VALUE
<b>REAL ESTATE</b> residence, business, other		
<b>SECURITIES</b> stocks, bonds, mutuals		
<b>CASH</b> bank a/c's, receivables, money markets		
<b>RETIREMENT ACCOUNTS</b>		

BUSINESS INTERESTS						
PERSONAL EFFECTS						
OTHER ASSETS, POTENTIAL INHERITANCE, ETC.						
LIFE INSURANCE	Insured	Company Name	Cash Value	Beneficiary	Policy Nos.	Face Amount
DEBTS & OBLIGATIONS						

Notes/Comments: \_\_\_\_\_

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