PERSONAL & FINANCIAL INFORMATION
In Case of My Death

Provided by Paul Premack, JD, CELA

Date completed: _______________, 20______.

Completed by: ____

Instructions: *This information form is designed to be very complete. If it asks for information that is not applicable to your situation, just answer "N/A" (not applicable) or cross out that section. If this pahphlet does not have a section that asks about something special or unusual in your circumstances, please provide that additional information on extra sheets.*

Information on --	Client	Spouse
Full name		
Any other names used		
Current age		
Date of birth		
Place of birth		
Length of time you have resided in Texas		
State or country of previous residence(s)		
Citizenship		
Will you remain permanent resident of Texas?		
Occupation or profession		
Business telephone number		
Social Security number		

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Paul Premack, Attorney at Law
8031 Broadway, San Antonio, TX 78209

Marital History

Current marital began on…		
Place of marriage		
Number of prior marriages		
Prior Spouse name, if any		
Date, place, and length of prior marriage		
Prior marriage ending date, place		
Any children from that marriage?		
Names of those children from prior marriage		

[Attach another page if necessary]

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Your Dependents and Immediate Family

[COMPLETE THE FOLLOWING INFORMATION FOR EACH CHILD, NOTING THOSE THAT ARE DECEASED – add another page if more space is needed]

Name and address of this child	
Age & Date of birth	
Is this child legally disabled?	
Name of spouse of this child	
Names of this child's children	

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Your Financial and Business Consultants

Names, addresses, and telephone numbers of your business and financial advisors, including:

Stockbroker	
Accountant	
Banker	
Other attorneys	

Inter Vivos Trusts

Have you previously established any inter vivos trusts? If yes, provide a copy of trust agreement to the attorney

Name of the trust	
Date established	
Value of corpus	
Revocable or irrevocable?	
Annual income from trust	
Income beneficiaries	
Residual beneficiaries	

Your Income

Salary		
Pension or Social Security		
Income from other sources		

Personal Property Assets

Checking accounts

Bank & Account number		
Balance		
How held		
Source of funds in account		

Bank & Account number		
Balance		
How held		
Source of funds in account		

Savings accounts

Bank & Account number		
Balance		
How held		
Source of funds in account		

Bank & Account number		
Balance		
How held		
Source of funds in account		

Safe deposit box:

Location		
Box number		
How held		
Description and value of contents		

Automobiles

Make, model & year		
Year acquired		
How registered		
Current value		
Loan Balance		

Insurance policies with death benefits

Policy number		
Insurer		
Type of policy		
Date acquired		
Cash value		
Face Amount		
Owner		
Beneficiaries		
Source of payment for premiums		

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Insurer		
Type of policy		
Date acquired		
Cash value		
Face Amount		
Owner		
Beneficiaries		
Source of payment for premiums		

Pensions, IRAs, profit sharing plans, and similar programs

Title or description of plan		
Name of sponsoring organization		
Advances or loans		
Payment options		
Cash value, if any		

Real Property

Residence:

Address and Legal Description	
How is title held? [E.G., joint tenancy]	
Source of funds for acquisition and improvements	
Date purchased	
Purchase price	
Outstanding mortgages, liens, and other encumbrances	
Estimated current market value	

Other real property

Address and description	
How is title held?	
Use [E.G., vacation home, income property]	
Date purchased	
Purchase price	

Approximate income tax basis	
Source of funds for acquisition and improvements	
Outstanding mortgages, liens, and other encumbrances	
Estimated current market value	

Debts, Liabilities, and Obligations

Description of obligation:	
Is obligation a sole or joint obligation?	
Is this secured or unsecured?	
Outstanding balance	
Due date of obligation	

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Is obligation a sole or joint obligation?	
Is this secured or unsecured?	
Outstanding balance	
Due date of obligation	

Personal Representatives

Executor:	**Name/address/phone**	**Name/address/phone**
First Choice:		
Second Choice:		
Third Choice:		

Financial Decision maker (if you lose the ability to handle your own finances):

First Choice:		
Second Choice:		
Third Choice:		

Medical Decision-maker (if you lose the ability to make your own medical decisions):

First Choice:		
Second Choice:		
Third Choice:		

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Paul Premack has practiced law in San Antonio since 1982, focusing on estate planning for people of all ages, on probate and on elder law. He is a Certified Elder Law Attorney, has been a Member of the National Academy of Elder Law Attorneys since 1989, and was a founding member of the Council of Advanced Practitioners of the National Academy of Elder Law Attorneys.

He earned his law degree at the University of Houston, and was the first attorney to complete the Geriatric Scholars program at the UT Health Science Center in San Antonio. Paul received the Kishpaugh Award from the San Antonio Bar Association for his contributions to the San Antonio Senior Community, is a Fellow of the College of the State Bar of Texas, and is a Fellow of the San Antonio Bar Foundation.

Paul is recognized by Texas Monthly as a Five Star Wealth Manager for Long Term Care, Will Preparation and Trust Services. He is one of about 22 lawyers statewide who have received this recognition five years in a row. Additionally, Paul was selected for Texas Legal Leaders, an ALM publication in partnership with Martindale-Hubble, highlighting Texas' top rated lawyers.

Paul is author of "The Senior Texan Legal Guide" (in its 7th Edition) and he has written a legal column for the Express-News since 1989. It currently appears weekly online at MySA.com and at ExpressNews.com. Paul also writes a monthly column that appears in the My Life section of the Express-News. His website www.Premack.com has a wealth of free legal information.