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WILLIAM J. BENZ  
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**NEW CLIENT WILL INFORMATION SHEET**

Date \_\_\_\_\_

**Name:** \_\_\_\_\_

D.O.B. \_\_\_\_\_ SS# \_\_\_\_\_

**Spouse's Name:** \_\_\_\_\_

D.O.B. \_\_\_\_\_ SS# \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: (Home) \_\_\_\_\_ (Fax) \_\_\_\_\_

(Work) \_\_\_\_\_ (Cell) \_\_\_\_\_

Husband's  
Occupation: \_\_\_\_\_ Employer \_\_\_\_\_

Wife's  
Occupation: \_\_\_\_\_ Employer \_\_\_\_\_

**Children's Names:**

\_\_\_\_\_ D.O.B. \_\_\_\_\_ At Home Y N

\_\_\_\_\_ D.O.B. \_\_\_\_\_ At Home Y N

\_\_\_\_\_ D.O.B. \_\_\_\_\_ At Home Y N

\_\_\_\_\_ D.O.B. \_\_\_\_\_ At Home Y N

**TO BE COMPLETED FOR HUSBAND'S WILL:**

**Executor:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**Alternate  
Executor:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**Trustee:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**Alternate Trustee:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**TO BE COMPLETED FOR WIFE'S WILL:**

**Executor:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**Alternate  
Executor:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**Trustee:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**Alternate Trustee:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**TO BE COMPLETED FOR BOTH HUSBAND'S AND WIFE'S WILLS:**

**Guardian of Person of Minors:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**Alternate Guardian of Person of Minors:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**Guardian of Estate of Minors:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

**Alternate Guardian of Estate of Minors:** \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

\_\_\_\_\_

## ASSET SUMMARY

	<b>CLIENT</b>	<b>SPOUSE</b>	<b>JOINT</b>	<b>TOTAL</b>
Cash/Money Mkt/Checking /Savings	\$ _____	\$ _____	\$ _____	\$ _____
Stock/Bonds/ Securities	\$ _____	\$ _____	\$ _____	\$ _____
IRA/401(k)/ Retirement Benefits	\$ _____	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____	\$ _____
Business Interest/Part- nerships	\$ _____	\$ _____	\$ _____	\$ _____
<u>Real Estate Properties</u>				
Primary Residence	\$ _____	\$ _____	\$ _____	\$ _____
Vacation Residence	\$ _____	\$ _____	\$ _____	\$ _____
Investment	\$ _____	\$ _____	\$ _____	\$ _____
<u>Other Property Values</u>				
Automobiles	\$ _____	\$ _____	\$ _____	\$ _____
Boats, Etc.	\$ _____	\$ _____	\$ _____	\$ _____
Misc'l	\$ _____	\$ _____	\$ _____	\$ _____
<u>Asset Totals</u>	\$ _____	\$ _____	\$ _____	\$ _____

## LIABILITY SUMMARY

	<b>CLIENT</b>	<b>SPOUSE</b>	<b>JOINT</b>	<b>TOTAL</b>
Personal Loans	\$ _____	\$ _____	\$ _____	\$ _____
Margins, Etc.	\$ _____	\$ _____	\$ _____	\$ _____
Insurance Loans	\$ _____	\$ _____	\$ _____	\$ _____
Business Loans	\$ _____	\$ _____	\$ _____	\$ _____
Credit Cards	\$ _____	\$ _____	\$ _____	\$ _____
 <u>Real Estate Mortgages</u>				
Primary Residence	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____
	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____
Vacation Residence	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____
	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____
Investment	\$ _____	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____	\$ _____
 <u>Other Property Loans</u>				
Automobiles	\$ _____	\$ _____	\$ _____	\$ _____
Boats, Etc.	\$ _____	\$ _____	\$ _____	\$ _____
Miscellaneous Liability	\$ _____	\$ _____	\$ _____	\$ _____
<u>Totals</u>	<u>\$ _____</u>	<u>\$ _____</u>	<u>\$ _____</u>	<u>\$ _____</u>

**NET WORTH SUMMARY**  
**(NET WORTH=ASSET TOTALS-LIABILITY TOTALS)**

Asset Totals	\$ _____	\$ _____	\$ _____	\$ _____
Liability Totals	\$ _____	\$ _____	\$ _____	\$ _____
<u>Net Worth</u> <u>Totals</u>	\$ _____	\$ _____	\$ _____	\$ _____

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NOTES: