



**\*\* Confidential Planning Information (for Married Couple) \*\***

*for use by Takacs McGinnis Elder Care Law, PLLC*

Your appointment with us is \_\_\_\_\_

These questions pertain to the persons (the married couple) for whom we are planning. Please do your best, but don't worry if you don't have all of the information. Please call us if you need help.

Date: \_\_\_\_\_

Referred by: \_\_\_\_\_

**1. Personal Information**

Spouse 1

Spouse 2

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

\_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

County: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

\_\_\_\_\_

Email: \_\_\_\_\_

\_\_\_\_\_

Birth date: \_\_\_\_\_

\_\_\_\_\_

Birth place: \_\_\_\_\_

\_\_\_\_\_

SSN: \_\_\_\_\_

SSN: \_\_\_\_\_

US citizen?:  Yes  No

Yes  No

Veteran?:  Yes  No

Yes  No

Dates of service: \_\_\_\_\_

Dates of service: \_\_\_\_\_

Branch of service: \_\_\_\_\_

Branch of service: \_\_\_\_\_

Wife's maiden name: \_\_\_\_\_

Date and place of marriage: \_\_\_\_\_

**2. Your primary contact person(s):** Landline  Cell  Text  Email  Mail  Fax  Other \_\_\_\_\_

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

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

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

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

\_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Place Where You Live	Spouse1:When?	Spouse2:When?
Single-family home or apartment		
Same, but you need assistance		
Independent living community:		
Assisted-living or memory care facility:		
Nursing home:		
Other:		

### 3. Children

Name: _____ Address: _____ _____ _____ DOB: _____ Phone: _____ Email: _____ Spouse: _____		Name: _____ Address: _____ _____ _____ DOB: _____ Phone: _____ Email: _____ Spouse: _____
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Name: _____ Address: _____ _____ _____ DOB: _____ Phone: _____ Email: _____ Spouse: _____		Name: _____ Address: _____ _____ _____ DOB: _____ Phone: _____ Email: _____ Spouse: _____
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Name: _____ Address: _____ _____ _____ DOB: _____ Phone: _____ Email: _____ Spouse: _____		Name: _____ Address: _____ _____ _____ DOB: _____ Phone: _____ Email: _____ Spouse: _____
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a. Do you have any dependents (someone who depends on you, in whole or in part, for their support)?

Yes  No    If yes, who?: \_\_\_\_\_

b. Are any of your children or other family members receiving Supplement Security Income, Social Security Disability; or, whether or not receiving any benefits, is blind or has any major disabilities?

Yes  No    If yes, who?: \_\_\_\_\_

**4. Information About Your Health (Spouse 1)**

a. What medical or health problems do you currently have?

b. What medical problems have you had in the past?

c. When were you last in the hospital, and why?

d. Please attach a list of the drugs you are currently taking to this workbook (or list them below).

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**5. Important Contact Information (Spouse 1)**

<b>Your Primary Care Physician</b>	<b>Your Financial Advisor/Broker</b>
Name: _____	Name: _____
Specialty: _____	Company: _____
Address: _____	Address: _____
_____	_____
Phone: _____	Phone: _____
Email: _____	Email: _____
_____	_____

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**6. Information About Your Health (Spouse 2)**

a. What medical or health problems do you currently have?

b. What medical problems have you had in the past?

c. When were you last in the hospital, and why?

d. Please attach a list of the drugs you are currently taking to this workbook (or list them below).

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**7. Important Contact Information (Spouse 2)**

<b>Your Primary Care Physician</b>	<b>Your Financial Advisor/Broker</b>
Name: _____	Name: _____
Specialty: _____	Company: _____
Address: _____	Address: _____
_____	_____
Phone: _____	Phone: _____
Email: _____	Email: _____
_____	_____

**8. Resources**

**a. Monthly Income (SS, VA, pension, employment)**

Source	Spouse 1	Spouse 2
Social Security:		
Pension:		
Other:		
<b>Total:</b>		

**b. Real Estate (please bring your deeds with you for us to copy)**

Address	Owner(s)	Tax Value	Mortgage	Date Acquired

**c. Other Assets: Bank accounts, CDs, annuities, stocks, retirement plans, and the like**

Type of Asset	Company Name	How Is It Titled?	Beneficiary	Value

**d. Life Insurance (including any policies through your employer)**

Policy Details	Policy 1	Policy 2	Policy 3
Company name			
Policy owner			
Insured			
Beneficiary			
Death benefit (face value)			
Current cash value (if any)			
Loan against policy (if any)			

**e. Large items of personal property you own (cars, boats, RVs, farm equipment, etc.)**

Personal Property (Item)	Value

**9. Health Insurance and Long-Term Care Insurance**

<b>a. Health Insurance</b>	<b>Spouse 1</b>	<b>Spouse 2</b>
Traditional Medicare	<input type="checkbox"/>	<input type="checkbox"/>
Medicare Supplemental Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Medicare Advantage Plan (e.g. Healthspring)	<input type="checkbox"/>	<input type="checkbox"/>
Retiree Health Insurance	<input type="checkbox"/>	<input type="checkbox"/>
TRICARE for Life	<input type="checkbox"/>	<input type="checkbox"/>
Other (please describe)	<input type="checkbox"/>	<input type="checkbox"/>

**b. Long-Term Care Insurance**

Spouse 1: Yes  No  / Spouse 2: Yes  No

**10. Final Arrangements**

Prepaid funeral, burial, cremation? Spouse 1: Yes  No  / Spouse 2: Yes  No

**11. Estate Planning**

<b>Do you have any of the following documents?</b>	<b>Spouse 1</b>	<b>Spouse 2</b>
Durable Power of Attorney Name of your Attorney-in-Fact:	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Health Care Power of Attorney/Advance Care Plan Name of your Health Care Agent:	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Will - Name of your Executor	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Revocable Living Trust – Name of your Trustee	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

If you have estate planning documents, please bring them with you to the meeting.

**12. Gifts and Transfers**

Have either of you given away any money or property within the past 60 months? Yes No

If Yes, what did you give away, when, and to whom?:

**13. Notes, comments, explanation:**

**14. Summary of your concerns, questions, and worries:**