

**LESSER, LUTREY & MCGLYNN, LLP**

**CLIENT ESTATE PLANNING PROFILE**

**ESTATE PLANNING PROFILE**

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

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

**Residence Address** \_\_\_\_\_

**Residence Telephone** \_\_\_\_\_

**Business** \_\_\_\_\_

**Business Address** \_\_\_\_\_

**Business Telephone** \_\_\_\_\_

**Spouse** \_\_\_\_\_

**Spouse Address** \_\_\_\_\_

**Business Address** \_\_\_\_\_

**Business Telephone** \_\_\_\_\_









**LIFE INSURANCE**

<b>Name of Company</b>	<b>Policy Type</b>	<b>Insured</b>	<b>Face Amount</b>	<b>Beneficiary</b>	<b>Cash Value</b>

**ASSETS – REAL ESTATE**

<b>Description</b>	<b>Property #1</b>	<b>Property #2</b>
<b>Location</b>		
<b>Use (Residence, Investment)</b>		
<b>Income Producing</b>		
<b>Owner</b>		
<b>Joint Owner</b>		
<b>How Acquired</b>		
<b>Date Acquired</b>		
<b>Cost</b>		
<b>Encumbrances</b>		

