

# RUBIN HAY PC

## Personal Information Checklist

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

Name \_\_\_\_\_ Nickname \_\_\_\_\_ U.S. Citizen [ ] Yes [ ] No

Home address \_\_\_\_\_

Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_ Email Address \_\_\_\_\_

Employer \_\_\_\_\_ Position \_\_\_\_\_

Business address \_\_\_\_\_ Business telephone \_\_\_\_\_

Birthdate \_\_\_\_\_ Date of Marriage \_\_\_\_\_

Spouse \_\_\_\_\_ Nickname \_\_\_\_\_ U.S. Citizen [ ] Yes [ ] No

Cell Phone \_\_\_\_\_ Email Address \_\_\_\_\_ Birthdate \_\_\_\_\_

Employer \_\_\_\_\_ Position \_\_\_\_\_

Business address \_\_\_\_\_ Business telephone \_\_\_\_\_

<b>Client's Children</b> ( <i>use full name</i> )	<b>ADDRESS</b>	<b>BIRTHDATE</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>Spouse's Children</b> ( <i>if different from above</i> )	<b>ADDRESS</b>	<b>BIRTHDATE</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>Other Relevant Parties</b>	<b>ADDRESS</b>	<b>RELATIONSHIP</b>
_____	_____	_____
_____	_____	_____

<b>Advisers</b>	<b>TELEPHONE</b>
Accountant _____	_____
Attorney _____	_____
Financial Planner _____	_____
Homeowners Insurance Agent _____	_____
Referred to our firm by _____	_____

**CASH**

Name of Institution	TYPE	OWNER*	AMOUNT
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**STOCKS AND BONDS**

Description	OWNER*	VALUE
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**REAL ESTATE**

General description and/or address	OWNER*	VALUE	MORTGAGE
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

\*Husband (H), Wife (W), Jointly (JT), Tenants in Common (TC)  
If property is owned either JT or TC with someone other than spouse, please furnish name and relationship.

**BUSINESS INTERESTS**

<i>Company (and Description)</i>	NUMBER OF SHARES	PERCENTAGE OWNERSHIP	BUY/SELL AGREEMENT**	OWNER*	VALUE

\*\*Please indicate if a Buy/Sell Agreement Exists

**RETIREMENT PLANS**  
(IRA, 401K etc)

Type of Plan	COMPANY	BENEFICIARY UPON YOUR DEATH	PERCENT VESTED	VALUE

**PERSONAL EFFECTS AND OTHER ASSETS**

*(Furniture, automobiles, jewelry, collectibles and other personal assets of more than nominal value)*

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Total estimated fair market value\_\_\_\_\_

**LIFE INSURANCE**

INSURED	COMPANY	AMOUNT	TERM/ WHOLE	LOANS	OWNER	BENEFICIARY
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

**LIABILITIES**

*(other than mortgages reflected above)*

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**ANTICIPATED INHERITANCE, GIFT, OR LAWSUIT JUDGMENT**

Description \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*Total estimated value* \_\_\_\_\_