

**CONFIDENTIAL
PERSONAL AND FINANCIAL DATA**

**TO ASSIST IN WEALTH PRESERVATION
AND
ESTATE PLANNING**

CONFIDENTIALITY NOTICE

The information herein provided to DAVID W. WULFERS is submitted for the purpose of facilitating the rendition of professional legal services. The following information is protected from disclosure pursuant to the provisions of *Okla. Stat. tit. 12, § 2502* and Rule 1.6 of the Rules of Professional Conduct as adopted by the Supreme Court of the State of Oklahoma

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FAMILY DATA

SELF

Name: _____

Date of Birth: _____

Home Address: _____

Telephone: _____

Business Address: _____

Telephone: _____

Nature of Employment: _____

SS No.: _____

Date of Marriage: _____

Previous Marriage: Yes _____ No _____

SPOUSE

Name: _____

Date of Birth: _____

Home Address: _____

Telephone: _____

Business Address: _____

Telephone: _____

Nature of Employment: _____

SS No.: _____

Date of Marriage: _____

Previous Marriage: Yes _____ No _____

CHILDREN

1. Name: _____

Date of Birth: _____ SS#: _____

2. Name: _____

Date of Birth: _____ SS#: _____

3. Name: _____

Date of Birth: _____ SS#: _____

4. Name: _____

Date of Birth: _____ SS#: _____

Identify children (by #): Deceased: _____ Adopted: _____ By Previous Marriage: (H) _____ (W) _____

Identify by name the children of each deceased child: _____

FINANCIAL DATA

A. REAL ESTATE

		How Property Is Titled Owner (Name) and Form of Title: Joint Tenancy (JT) Tenancy in Common (TC) or Sole Owner
<u>Description</u>	<u>Fair Market Value</u>	
1. Home: _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____
TOTAL: \$ _____		

B. OIL AND GAS PROPERTIES

<u>Description</u>	<u>Fair Market Value</u>	<u>How Property is Titled</u>
1. _____	\$ _____	_____
2. _____	\$ _____	_____
TOTAL: \$ _____		

C. CASH

<u>Bank</u>	<u>Average Balance</u>	<u>Type of Account</u> (Savings, Checking)	How Account is Titled
1. _____	\$ _____	_____	_____
2. _____	\$ _____	_____	_____
3. _____	\$ _____	_____	_____
4. _____	\$ _____	_____	_____
TOTAL: \$ _____			

D. MONEY MARKET, T-BILLS, C.D.'S, ETC.

	<u>Issuer</u>	<u>Description of Instrument</u>	<u>Face Amount</u>	<u>How Property Is Titled</u>
1.	_____	_____	\$ _____	_____
2.	_____	_____	\$ _____	_____
3.	_____	_____	\$ _____	_____
4.	_____	_____	\$ _____	_____
TOTAL:			\$ _____	

E. SECURITIES

	<u>Issuer</u>	<u>Description</u> (Stocks, Bonds, Mutual Funds, Etc.)	<u>Fair Market</u> <u>Value</u>	<u>How Property Is Titled</u>
1.	_____	_____	\$ _____	_____
2.	_____	_____	\$ _____	_____
3.	_____	_____	\$ _____	_____
4.	_____	_____	\$ _____	_____
TOTAL:			\$ _____	

F. RETIREMENT ACCOUNTS

	<u>Type of Account</u> (I.R.A.'s, Pension, Profit sharing, SEP's, etc.)	<u>Owner</u>	<u>Beneficiary</u>	<u>Current</u> <u>Value</u>
1.	_____	_____	_____	\$ _____
2.	_____	_____	_____	\$ _____
3.	_____	_____	_____	\$ _____
4.	_____	_____	_____	\$ _____
TOTAL:				\$ _____

Fair Market Value

G. CARS, FURNITURE AND CLOTHING

1.	_____	\$ _____
2.	_____	\$ _____
3.	_____	\$ _____

Total \$ =====

H. VALUABLE PERSONAL PROPERTY

	<u>Object</u>	<u>Fair Market Value</u>	<u>Owner</u>
1.	_____	\$ _____	_____
2.	_____	\$ _____	_____
3.	_____	\$ _____	_____
4.	_____	\$ _____	_____
TOTAL:		\$ _____	

I. LIFE INSURANCE

	<u>Company - Policy #</u>	<u>Owner</u>	<u>Beneficiary</u>	<u>Face Amount</u>	<u>Loans</u>
1.	_____	_____	_____	\$ _____	\$ _____
2.	_____	_____	_____	\$ _____	\$ _____
3.	_____	_____	_____	\$ _____	\$ _____
4.	_____	_____	_____	\$ _____	\$ _____
TOTAL:				\$ _____	\$ _____

J. BUSINESS INTERESTS

Name of Business: _____ Address: _____

Nature of Business: _____

Type of Organization (Circle): C Corporation, S Corporation, Partnership, Limited Partnership, L.L.C., Trust or Sole Proprietorship

Fair Market Value of Business: \$ _____

Percent of Your Ownership: _____ %

Attach copies of Stock Purchase or other Stock Agreements.

(If you own interest in more than one business, repeat information on separate sheet)

K. ANNUAL INCOME

Husband:	Source: _____	Source: _____	Source: _____
	Amount: \$ _____	Amount: \$ _____	Amount: \$ _____
Wife:	Source: _____	Source: _____	Source: _____
	Amount: \$ _____	Amount: \$ _____	Amount: \$ _____

L. ASSETS NOT IDENTIFIED PREVIOUSLY

<u>Description</u>	<u>Fair Market Value</u>	<u>How Property Is Titled</u>
1. _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____
4. _____	\$ _____	_____
TOTAL:		\$ _____

M. BENEFICIARY

Are you beneficiary, or possible beneficiary, of any:

1. Trust? If so, describe:
2. Life Insurance not identified in I? If so, describe:
3. Power of Appointment? ____ Yes ____ No. If yes, attach copy of instrument which grants power.
4. Estate? If so, describe:

5. Gift? If so, describe:

N. LOANS

	<u>Amount</u>	<u>Debtor</u>	<u>Creditor</u>	<u>Due Date</u>	<u>Terms</u>	Security for Loan (Identify by Asset <i>i.e.</i> , A.1.)
1.	\$ _____	_____	_____	_____	_____	_____
2.	\$ _____	_____	_____	_____	_____	_____
3.	\$ _____	_____	_____	_____	_____	_____
	\$ _____	TOTAL				

O. OTHER OBLIGATIONS

	Obligation (Surety, Term Leases, <u>Guarantor, etc.</u>)	<u>Obligor</u>	<u>Terms</u>	Security for Obligation (Identify by Asset, <i>i.e.</i> , A.1.)
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

P. TAXABLE GIFTS PREVIOUSLY MADE

	<u>To Whom</u>	<u>Property</u>	<u>Reported Value</u>	<u>Year of Gift</u>
1.	_____	_____	\$ _____	19 _____
2.	_____	_____	\$ _____	19 _____

PLANNING GOALS AND OBJECTIVES

1. Describe how you wish your property to be distributed.

2. Any special health, education, etc., situations or circumstances in family you wish addressed?

3. Special provisions relating to husband.

4. Special provisions relating to wife.

5. Special provisions relating to others (children, parents, brothers, sisters, etc.).

6. Charitable gifts. To whom and amount or property.

7. Guardian for minor children:

<u>Primary</u>	<u>Alternate</u>
Name: _____	Name: _____
Address: _____	Address: _____

8. Do you wish to prepare a Directive to Physician (Living Will)? Yes _____ No _____

9. Do you wish to appoint a Health Care Proxy? Name: _____

10. Do you wish to prepare a Durable Power of Attorney? Yes _____ No _____

Who shall have the power? _____

11. BE SURE TO ATTACH COPY OF YOUR CURRENT WILL AND TRUST.