CONFIDENTIAL
PERSONAL AND FINANCIAL DATA

TO ASSIST IN WEALTH PRESERVATION
AND
ESTATE PLANNING

CONFIDENTIALITY NOTICE

The information herein provided to JAMES, POTTS & WULFERS, INC., 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

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

B. OIL AND GAS PROPERTIES

	Description	Fair Market Value	How Property is Titled
1.		$	
2.		$	
	TOTAL:	$	

C. CASH

	Bank	Average Balance	Type of Account (Savings, Checking)	How Account is Titled
1.		$		
2.		$		
3.		$		
4.		$		
	TOTAL:	$		

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

	Issuer	Description of Instrument	Face Amount	How Property Is Titled
1.			$	
2.			$	
3.			$	
4.			$	
	TOTAL:	$		

E. SECURITIES

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

F. RETIREMENT ACCOUNTS

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

G. CARS, FURNITURE AND CLOTHING

		Fair Market Value
1.		$
2.		$
3.		$
		Total $ =========================

H. VALUABLE PERSONAL PROPERTY

	Object	Fair Market Value	Owner
1.		$	
2.		$	
3.		$	
4.		$	
	TOTAL:	$	

I. LIFE INSURANCE

	Company - Policy #	Owner	Beneficiary	Face Amount	Loans
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

	Description	Fair Market Value	How Property Is Titled
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

	Amount	Debtor	Creditor	Due Date	Terms	Security for Loan (Identify by Asset *i.e.*, A.1.)
1.	$______	______	______	______	______	______
2.	$______	______	______	______	______	______
3.	$______	______	______	______	______	______
	$______	TOTAL				

O. OTHER OBLIGATIONS

	Obligation (Surety, Term Leases, Guarantor, etc.)	Obligor	Terms	Security for Obligation (Identify by Asset, *i.e.*, A.1.)
1.	______	______	______	______
2.	______	______	______	______
3.	______	______	______	______

P. TAXABLE GIFTS PREVIOUSLY MADE

	To Whom	Property	Reported Value	Year of Gift
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:

Primary		Alternate	
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. <u>BE SURE TO ATTACH COPY OF YOUR CURRENT WILL AND TRUST</u>.