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| **PARTNERSHIP PLANNING QUESTIONNAIRE** |

Lawrence S. Jacobs, Esq.



Maryland • Washington, D.C. • VIRGINIA

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_,** 202\_\_

**How did you learn about our firm? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **PERSONAL AND FAMILY DATA** | | |
|  | **Person #1** | **Person #2** |
| Full legal name | Mr./Ms./Dr. | Mr./Ms./Dr. |
| Social Security # | **Last 4 digits only** |  |
| YEAR of birth |  |  |
| Are you a U.S. Citizen? Yes \_\_\_\_ No \_\_\_\_ If no, do you have a green card? Yes \_\_\_\_ No \_\_\_\_ | | |

**How long have you been together? \_\_\_\_\_\_\_\_\_\_\_\_\_\_** **Anniversary date:**  \_\_\_\_/\_\_\_\_/\_\_\_\_

mo. day yr.

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| **RESIDENCE CONTACT INFO** | | |
|  | **Person #1** | **Person #2** |
| Address |  |  |
| Home Phone |  |  |
| Cell Phone |  |  |
| Email |  |  |

|  |  |  |
| --- | --- | --- |
| **BUSINESS CONTACT INFO** | | |
|  | **Person #1** | **Person #2** |
| Business/Employer  Name &Address |  |  |
| Telephone |  |  |
| Email |  |  |
| Description of Business/ Profession |  |  |

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| **MARRIAGES, CIVIL UNIONS & DOMESTIC PARTNERSHIPS (current and former, if applicable)** | | |
|  | **Person #1** | **Person #2** |
| Spouse (current/former) |  |  |
| Date & place |  |  |
| Date of dissolution (if any) |  |  |
| Court of dissolution (if any) |  |  |

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| --- | --- | --- | --- | --- |
| **CHILDREN** | | | | |
| Do you plan to have children in the future? Yes \_\_\_\_ No \_\_\_\_ Maybe \_\_\_\_ | | | | |
| **Person #1 – Children, including those legally adopted** | | | | |
| **Name** | **Date of birth** | **Residence (City, State)** | **Profession/Business** | **Name of partner/ spouse** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **Person #2 – Children, including those legally adopted** | | | | |
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| **ASSET INFORMATION** |

|  |  |  |
| --- | --- | --- |
| **ANNUAL INCOME** | | |
|  | **Person #1** | **Person #2** |
| Salary | **$** | **$** |
| Other | **$** | **$** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **REAL ESTATE OWNED** | | | | |
| **Location & Type** | **Mortgage balance** | **Approximate market value** | **Original cost** | **In whose name?** |
|  | **$** | **$** | **$** |  |
|  | **$** | **$** | **$** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **LIFE INSURANCE** | | | | | |
| **Company & Policy #** | **Death benefit** | **Approx. cash value** | **Person insured** | **Owner** | **Beneficiary** |
|  | **$** | **$** |  |  |  |
|  | **$** | **$** |  |  |  |

|  |  |  |
| --- | --- | --- |
| **CASH ACCOUNTS (non-retirement)** | | |
| **Institution** | **Approx. Balance** | **In whose name(s)?** |
|  | **$** |  |
|  | **$** |  |
|  | **$** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **BROKERAGE ACCOUNTS (non-retirement)** | | | | | |
| **Company** | **# of shares** | **Original cost** | **Approx. Market Value** | **Date of purchase** | **In whose name(s)?** |
|  |  | **$** | **$** |  |  |
|  |  | **$** | **$** |  |  |
|  |  | **$** | **$** |  |  |
|  |  | **$** | **$** |  |  |

|  |  |  |
| --- | --- | --- |
| **RETIREMENT PLANS & ACCOUNTS** | | |
| **Person #1** | | |
| **Description** | **Beneficiary** | **Value** |
|  |  | **$** |
|  |  | **$** |
| **Person #2** | | |
|  |  | **$** |
|  |  | **$** |

|  |  |  |
| --- | --- | --- |
| **SIGNIFICANT DEBTS** | | |
| **Type** | **Creditor** | **Approx. amount** |
|  |  | **$** |
|  |  | **$** |
|  |  | **$** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **EXISTING DOCUMENTS FOR REVIEW** | | | | |
| *Please indicate which documents you currently have.* | **Person #1** | | **Person #2** | |
| **Yes** | **No** | **Yes** | **No** |
| Will and/or trust |  |  |  |  |
| Real property deeds |  |  |  |  |
| Partnership and corporate agreements |  |  |  |  |
| Powers of attorney |  |  |  |  |

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| **PETS** |
| **Do you have pets? Yes \_\_\_\_ No \_\_\_\_** |

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