

1 <sup>st</sup> Person/Spouse (Him)	2 <sup>nd</sup> Person/Spouse (Her)
Surname:	Surname:
First Name:	First Name:
Middle Initial	Middle Initial:
Date of birth:	Date of birth:
US Citizen: Y / N	US Citizen: Y / N
First Marriage: Y / N	First Marriage: Y / N
Children prior current marriage: Y / N	Children prior current marriage: Y / N
Home address:	Home address:
Cell Phone: Home Phone: Other:	Cell Phone: Home Phone: Other:
Email:	Email
Mailing Address (if different from home address):	Mailing Address (if different from home address):

<b>Children's Names</b>			
<b>1<sup>st</sup> Child's Name:</b>		<b>2nd Child's Name:</b>	
<b>Minor or Adult</b>		<b>Minor or Adult</b>	
<b>Married: Y / N</b>		<b>Married: Y / N</b>	
<b>Address:</b>		<b>Address:</b>	
<b>Children to this marriage: Y / N</b>		<b>Children to this marriage: Y / N</b>	
<b>Names:</b>	<b>Minor or Adult</b>	<b>Names:</b>	<b>Minor or Adult</b>
<b>Names:</b>	<b>Minor or Adult</b>	<b>Names:</b>	<b>Minor or Adult</b>
<b>Names:</b>	<b>Minor or Adult</b>	<b>Names:</b>	<b>Minor or Adult</b>
<b>Names:</b>	<b>Minor or Adult</b>	<b>Names:</b>	<b>Minor or Adult</b>
<b>3<sup>rd</sup> Child's Name:</b>		<b>4th Child's Name:</b>	
<b>Minor or Adult</b>		<b>Minor or Adult</b>	
<b>Married: Y / N</b>		<b>Married: Y / N</b>	
<b>Address:</b>		<b>Address:</b>	
<b>Children to this marriage: Y / N</b>		<b>Children to this marriage: Y / N</b>	
<b>Names:</b>	<b>Minor or Adult</b>	<b>Names:</b>	<b>Minor or Adult</b>
<b>Names:</b>	<b>Minor or Adult</b>	<b>Names:</b>	<b>Minor or Adult</b>
<b>Names:</b>	<b>Minor or Adult</b>	<b>Names:</b>	<b>Minor or Adult</b>
<b>Names:</b>	<b>Minor or Adult</b>	<b>Names:</b>	<b>Minor or Adult</b>

**Division of Estate**

Equally to all children Y / N

Unequally: specify to whom and by percentage

**Relationship:**

**Name:**

**Address:**

Percentage \_\_\_\_%

**Relationship:**

**Name:**

**Address:**

Percentage \_\_\_\_%

**Relationship:**

**Name:**

**Address:**

Percentage \_\_\_\_%

**Relationship:**

**Name:**

**Address:**

Percentage \_\_\_\_%

**Per Stirpes: Y / N**

(Means equally by representation) further defined as: if a child of yours passes away before you then that child's share will go to that child's children.

**Pro Rata: Y / N**

(Meaning equally among the surviving children or grandchildren of the client).

**Other bequests:**



### Trustees

(Person or persons in charge of management of the trust and distribution to beneficiaries)

<b>1<sup>st</sup> Person</b>  <b>Surname:</b>  <b>First Name:                                  MI:</b>	<b>Address:</b>
<b>2<sup>nd</sup> Person</b>  <b>Surname:</b>  <b>First Name:                                  MI:</b>	<b>Address:</b>
<b>3<sup>rd</sup> Person</b>  <b>Surname:</b>  <b>First Name:                                  MI:</b>	<b>Address:</b>

When there are more than one trustee serving at a time there can be co-trust authority or there can be governance by a committee. When there is governance by a committee there can be unevenly weighted authority. Also, in either case of co-trustee or governance by committee there can be a neutral third party to act as a tie breaker in case there is a deadlock in deciding whether or not to do an act.

### Agents

#### His Health Care Power Of Attorney

<b>1<sup>st</sup> Person</b>  <b>Surname:</b>  <b>First Name:                                  MI:</b>	<b>Address:</b>
<b>2<sup>nd</sup> Person</b>  <b>Surname:</b>  <b>First Name:                                  MI:</b>	<b>Address:</b>
<b>3<sup>rd</sup> Person</b>  <b>Surname:</b>  <b>First Name:                                  MI:</b>	<b>Address:</b>

<b>Her Health Care Power Of Attorney</b>	
<p><b>1<sup>st</sup> Person</b></p> <p>Surname: _____</p> <p>First Name: _____ MI: _____</p>	<p><b>Address:</b></p> <p>_____</p> <p>_____</p> <p>_____</p>
<p><b>2<sup>nd</sup> Person</b></p> <p>Surname: _____</p> <p>First Name: _____ MI: _____</p>	<p><b>Address:</b></p> <p>_____</p> <p>_____</p> <p>_____</p>
<p><b>3<sup>rd</sup> Person</b></p> <p>Surname: _____</p> <p>First Name: _____ MI: _____</p>	<p><b>Address:</b></p> <p>_____</p> <p>_____</p> <p>_____</p>
<b>His Durable Power Of Attorney</b>	
<p><b>1<sup>st</sup> Person</b></p> <p>Surname: _____</p> <p>First Name: _____ MI: _____</p>	<p><b>Address:</b></p> <p>_____</p> <p>_____</p> <p>_____</p>
<p><b>2<sup>nd</sup> Person</b></p> <p>Surname: _____</p> <p>First Name: _____ MI: _____</p>	<p><b>Address:</b></p> <p>_____</p> <p>_____</p> <p>_____</p>
<p><b>3<sup>rd</sup> Person</b></p> <p>Surname: _____</p> <p>First Name: _____ MI: _____</p>	<p><b>Address:</b></p> <p>_____</p> <p>_____</p> <p>_____</p>
<p> </p>	<p> </p>
<p> </p>	<p> </p>
<p> </p>	<p> </p>



<b>Her Durable Power Of Attorney</b>	
<b>1<sup>st</sup> Person</b> Surname: First Name: MI:	<b>Address:</b>
<b>2<sup>nd</sup> Person</b> Surname: First Name: MI:	<b>Address:</b>
<b>3<sup>rd</sup> Person</b> Surname: First Name: MI:	<b>Address:</b>
<b>Guardianship</b> (Only for clients with minor children)	
<b>Primary Guardian: Only name one person even if that person is married. For example, if it's your sister, only name your sister and not your sister and her husband.</b>	
<b>Primary Guardian</b> Surname: First Name: MI:	<b>Address:</b>
<b>Secondary Guardian</b> Surname: First Name: MI:	<b>Address:</b>
<b>Tertiary Guardian</b> Surname: First Name: MI:	<b>Address:</b>

<b>Legacy and Succession Planning</b>	
<b>Family Bank Legacy Distribution for Shift Evolution Members Only</b>	
Do you want your children to be restricted to the provisions of the Shift Evolution Bank? Y / N	
Do you want to retain some provisions for distribution without the restrictions of the Shift Evolutions Bank? Y / N	
Specify what provisions you would like to change under the Shift Evolution provisions:	
<b>Income</b>	
First Person/Spouse income (His)	Second Person/Spouse income (Hers)
Income amount (monthly): \$ _____ Source:	Income amount (monthly): \$ _____ Source:
Income amount (monthly): \$ _____ Source:	Income amount (monthly): \$ _____ Source:
Income amount (monthly): \$ _____ Source:	Income amount (monthly): \$ _____ Source:
<b>Total:</b> \$ _____	<b>Total:</b> \$ _____

**Asset Inventory**  
**Real Estate**

<b>Primary Residence:</b> Address:	<b>Value (Fair Market Value):</b> \$ _____  <b>Debt:</b> \$ _____
<b>Secondary Residence:</b> Address:	<b>Value (Fair Market Value):</b> \$ _____  <b>Debt:</b> \$ _____
<b>Tertiary Residence (Lake House, Vacation Home, Summer Camp):</b> Address:	<b>Value (Fair Market Value):</b> \$ _____  <b>Debt:</b> \$ _____

**Investment Real Estate**

<b>1<sup>st</sup>:</b> <b>Name on the Deed:</b>  Address:	<b>Value (Fair Market Value):</b> \$ _____  <b>Debt:</b> \$ _____
<b>2<sup>nd</sup>:</b> <b>Name on the Deed:</b>  Address:	<b>Value (Fair Market Value):</b> \$ _____  <b>Debt:</b> \$ _____
<b>3<sup>rd</sup>:</b> <b>Name on the Deed:</b>  Address:	<b>Value (Fair Market Value):</b> \$ _____  <b>Debt:</b> \$ _____



**Business Holdings**

<p><b>1<sup>st</sup> Name of Company:</b></p> <p><b>Ownership type: LLC – Corporation – Sole Proprietorship FLP</b></p> <p><b>Other:</b></p> <p><b>Service Type:</b></p> <p><b>Percentage of ownership: _____ %</b></p> <p><b>Address:</b></p>	<p><b>Value (Fair Market value):</b></p> <p>\$ _____</p> <p><b>Debt: \$</b> _____</p> <p><b>Inventory:</b></p>
<p><b>2<sup>nd</sup> Name of Company:</b></p> <p><b>Ownership type: LLC – Corporation – Sole Proprietorship FLP</b></p> <p><b>Other:</b></p> <p><b>Service Type:</b></p> <p><b>Percentage of ownership: _____ %</b></p> <p><b>Address:</b></p>	<p><b>Value (Fair Market value):</b></p> <p>\$ _____</p> <p><b>Debt: \$</b> _____</p> <p><b>Inventory:</b></p>

<p><b>3<sup>rd</sup> Name of Company:</b></p> <p><b>Ownership type:</b> LLC – Corporation – Sole Proprietorship          FLP          Other:</p> <p><b>Service Type:</b></p> <p><b>Percentage of ownership:</b> _____ %</p> <p><b>Address:</b></p>	<p><b>Value (Fair Market value):</b></p> <p>\$ _____</p> <p><b>Debt:</b> \$ _____</p> <p><b>Inventory:</b></p>
<p><b>4<sup>th</sup> Name of Company:</b></p> <p><b>Ownership type:</b> LLC – Corporation – Sole Proprietorship          FLP          Other:</p> <p><b>Service Type:</b></p> <p><b>Percentage of ownership:</b> _____ %</p> <p><b>Address:</b></p>	<p><b>Value (Fair Market value):</b></p> <p>\$ _____</p> <p><b>Debt:</b> \$ _____</p> <p><b>Inventory:</b></p>
<p><b>His Life insurance Name:</b></p> <p><b>Amounts</b> \$ _____</p> <p><b>Type of insurance:</b></p> <p>Cash Value Whole Life / Term / Index Universal Life</p>	<p><b>Her Life insurance Name:</b></p> <p><b>Amounts</b> \$ _____</p> <p><b>Type of insurance:</b></p> <p>Cash Value Whole Life/Term/Index Universal Life</p>

**Investment Assets**

Please indicate either Retirement or Non-Retirement Account (Retirement Accounts: IRA,401K, Roths)

<p><b>Investment Amount:</b> \$ _____</p> <p><b>Adviser:</b></p> <p><b>Firm:</b></p> <p><b>Name:</b></p> <p><b>Address:</b></p>	<p><b>Investment Amount:</b> \$ _____</p> <p><b>Adviser:</b></p> <p><b>Firm:</b></p> <p><b>Name:</b></p> <p><b>Address:</b></p>
<p><b>Investment Amount:</b> \$ _____</p> <p><b>Adviser:</b></p> <p><b>Firm:</b></p> <p><b>Name:</b></p> <p><b>Address:</b></p>	<p><b>Investment Amount:</b> \$ _____</p> <p><b>Adviser:</b></p> <p><b>Firm:</b></p> <p><b>Name:</b></p> <p><b>Address:</b></p>
<p><b>Investment Amount:</b> \$ _____</p> <p><b>Adviser:</b></p> <p><b>Firm:</b></p> <p><b>Name:</b></p> <p><b>Address:</b></p>	<p><b>Investment Amount:</b> \$ _____</p> <p><b>Adviser:</b></p> <p><b>Firm:</b></p> <p><b>Name:</b></p> <p><b>Address:</b></p>

<b>Local Bank Account</b> <i>(Please do not list accounts numbers)</i>	
<b>Name of Bank:</b>  Checking, CD, Savings  <b>Amount on accounts:</b> \$ _____	<b>Name of Bank:</b>  Checking, CD, Savings  <b>Amount on accounts:</b> \$ _____
<b>Name of Bank:</b>  Checking, CD, Savings  <b>Amount on accounts:</b> \$ _____	<b>Name of Bank:</b>  Checking, CD, Savings  <b>Amount on accounts:</b> \$ _____
<b>Collectibles, Antiques, Tools, Vehicles, etc.</b> <b>List with details and estimated values</b>	
<b>Special Instructions:</b>	