KAMINSKY, THOMAS, WHARTON, LOVETTE & VIGNA

CLIENT ESTATE INFORMATION FORM

Name:_____ Birthdate:_____

Spouse's Name:_____ Birthdate:_____

Address:_____

City:_____ State:_____ ZIP:_____

Phone:_(_____)_____

Bank Accounts

Please use the following descriptions in the TYPE Column below.
(Checking, Savings, CD, MoneyMarket)

Type	Description	Owner	Asset Value
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	

Real Estate

Please use the following descriptions in the TYPE Column below.
(Primary Residence, Second Residence, Land, Vacation Home, Rental Property, Commercial Property)

Type	Description	Owner	Asset Value
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	

Investments

Please use the following descriptions in the TYPE Column below.
(Bonds, Common Stock, Preferred Stock, Stock Brokerage, Mutual Fund, Ltd. Partnership)

Type	Description	Owner	Asset Value
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	

Insurance

Please use the following descriptions in the TYPE Column below.
(Term Policy, Whole Life Policy, Universal Life Policy, Variable Life Policy)

Type	Description	Owner	Asset Value
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	

Retirement

Please use the following descriptions in the TYPE Column below.
(401k, 403b, IRA, Qualified Plan, SEP/IRA, Other)

Type	Description	Owner	Asset Value
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	

Business

Please use the following descriptions in the TYPE Column below.
(General Partnership, Ltd. Partnership, C Corporation, S Corporation, Sole Proprietorship, LLC)

Type	Description	Owner	Asset Value
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	

Other

Please use the following descriptions in the TYPE Column below.
(Collectables, Miscellaneous, Recreational)

Type	Description	Owner	Asset Value
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	

Liabilities

Please use the following descriptions in the TYPE Column below.
(Mortgage, Personal Loan, Other Loans)

Type	Description	Owner	Asset Value
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	
		Co-Owned Husband Wife	