

**LAWRENCE S. JACOBS & ASSOCIATES, P.C.**

ATTORNEYS AND COUNSELORS AT LAW

Maryland ---- Virginia ---- Washington, D.C.

**PARTNERSHIP PLANNING QUESTIONNAIRE**

Date: \_\_\_\_\_

**A. PERSONAL AND FAMILY DATA**

**PERSON 1:**

**PERSON 2:**

\_\_\_\_\_  
Mr. Ms. Dr. Full Legal Name

\_\_\_\_\_  
Mr. Ms. Dr. Full Legal Name

Social Security # \_\_\_\_\_

Social Security # \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

How long have you been together? \_\_\_\_\_

When is your anniversary? \_\_\_\_/\_\_\_\_/\_\_\_\_  
month date year

**Residence Address/Telephone/Fax/E-Mail:**

<b>PERSON 1:</b>	<b>PERSON 2:</b>
Residence Address:	
Residence Telephone:	
Cell Phone:	
Fax:	
E-Mail	

**Business Address/Telephone/Fax/E-Mail:**

	<b>Person 1</b>	<b>Person 2</b>
Business/Employer Name & Address:		
Business Telephone:		
Fax:		
E-Mail		
Description of Business/ Profession		

Children and/or Dependents. Do you plan to have children in the future? \_\_\_\_\_

**Person 1 -Children (Including those legally adopted):**

Name	Birthday	City & State	Profession/Business	Partner/Spouse Name

**Person 2 -Children (Including those legally adopted):**

Name	Birthday	City & State	Profession/Business	Partner/Spouse Name

**Marriages, Civil Unions & Domestic Partnerships (Current & Former, If Applicable)**

	Person 1	Person 2
<b>Spouse (Current/Former)</b>		
<b>Date and Place</b>		
<b>Date of Dissolution (if any)</b>		
<b>Court of Dissolution (if any)</b>		

**Grandchildren:**

Name of Grandchild	Name of Parent	Date of Birth

**Living Parents, Age, Health, City & State:**

Person 1	Person 2

**Brothers and Sisters, Age, Health, City & State:**

Person 1	Person 2

**Nieces and Nephews, Age, City & State:**

Person 1	Person 2

**Annual Incomes:**

	Person 1	Person 2
Salary	\$	\$
Other		

**B. ASSET INFORMATION**

Does Person 1 or Person 2:

- |     |   |                              |                             |
|-----|---|------------------------------|-----------------------------|
| (a) | Expect to inherit something from parents or others?             | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (b) | Expect to receive benefits from a retirement plan?              | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (c) | Expect to receive gifts from parents or others?                 | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (d) | Have interests in trusts?                                       | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (f) | Made gifts in excess of \$13,000 to any person in any one year? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (g) | Have a will or powers of attorney now?                          | Yes <input type="checkbox"/> | No <input type="checkbox"/> |

Do you have a living-together agreement?      Yes  No

**Real Estate Owned:**

Location and Type	Mortgage Balance	Approximate Market Value	Original Cost	How Is Title Held?

**Life Insurance:**

<b>Company and Policy Number</b>	<b>Death Benefit</b>	<b>Approximate Cash Value</b>	<b>Person Insured</b>	<b>Owner</b>	<b>Beneficiary</b>

**Cash Accounts (non-retirement):**

<b>Institution</b>	<b>Approximate Balance</b>	<b>In Whose Name(s)?</b>

**Securities (non-retirement):**

<b>Company</b>	<b>No. of Shares</b>	<b>Original Cost</b>	<b>Approximate Market Value</b>	<b>Date of Purchase</b>	<b>In Whose Name?</b>

**Personal Property (vehicles, jewelry, art, collections, other valuable household goods):**

<b>Description</b>	<b>Original Cost</b>	<b>Owner</b>	<b>Fair Market Value</b>

**Pets:**

Do you have pets?      Yes / No
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**Retirement Plans and Accounts:**

Person 1 -- Description	Beneficiary	Value

Person 2 -- Description	Beneficiary	Value

**Significant Debts:**

Type and to Whom Owed	Approximate Amount

**Important Documents to be Examined:**

- Existing Wills and Trusts
- Real Property Deeds
- Partnership and Corporate Agreements
- Existing Powers of Attorney

**Existing Advisors:**

	Person 1	Person 2
Attorney		
Banking		
Life Insurance		
Accountant		
Financial Advisor		