

John Hancock

LIFE INSURANCE

Estate Planning Fact Finder



Estate Planning Fact Finder Short Form

Date: _____

Personal Information

Client Name: _____

Date of Birth: _____

Citizenship: _____

State of Residence: _____

Smoker (y/n): _____

Underwriting Class (preferred, standard, etc.): _____

Spouse Name: _____

Date of Birth: _____

Citizenship: _____

State of Residence: _____

Smoker (y/n): _____

Underwriting Class (preferred, standard, etc.): _____

Number of Children: _____

Number of Married Children: _____

Number of Grandchildren: _____

Financial Information

Client's Annual Salary: _____ \$

Spouse's Annual Salary: _____ \$

Other Income: _____ \$

Spouse's Other Income: _____ \$

Total Adjusted Gross Income: _____ \$

Income Tax Bracket: _____ %

Current Estate

Any wills or trusts in place? _____

Credit Shelter Trust established? _____

Amount of current annual exclusion gifts: _____

Current annual taxable gifts: _____

Remaining Applicable Exclusion

Client: _____ Spouse: _____

Client's prior taxable gifts: _____

Gift Tax paid: _____

Spouse's prior taxable gifts: _____

Gift Tax paid: _____

Assumptions for Analysis

Years until death

Client: _____ Spouse: _____

Years between deaths: _____

Who is assumed to die first? _____

Estimated probate and administration costs: _____

Assets & Liabilities

Asset Name	Growth Rate	Owner		
		Client	Spouse	Joint
Checking & Savings Accounts (including Money Market Funds and CDs)				
Bonds & Bond Funds				
Stocks & Mutual Funds				
Real Estate				
Annuities				
Business Interests				
Miscellaneous (personal property, autos, boats, planes, art, jewelry, collectibles)				
Retirement Plans (401k, IRAs, etc.)				
Life Insurance				
TOTAL ASSETS				
Liabilities				
Real Estate Mortgages				
Loans				
Other Obligations				
Tax Liabilities				
TOTAL LIABILITIES				
NET WORTH				

Comments:

Insurance products are issued by: John Hancock Life Insurance Company (U.S.A.), Boston, MA 02116
(not licensed in New York) and John Hancock Life Insurance Company of New York, Valhalla, NY 10595.

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