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Union County Office
15 Brant Avenue, # 5
Clark, NJ 07066

Office Meeting Date _____ Time: _____ Appointment with _____

與律師或會計師預約見面時，請帶下列文件：

1. 上兩年入息申報表 (Past two years Income Tax Return)
2. 所有股票及共同基金戶口月結帳單 (Brokerage Statements)
3. 所有退休金戶口月結帳單 (IRA, 401(k) & Retirement Account Statements)
4. 所有人壽保險及年金合約 (Life Insurance & Annuity Policies)

家庭資料 (Family Information)

Name (姓名) _____ Age (年齡) _____ 歲 F 男 FM 女

Social Security Number (工咭號碼) _____

Work Phone(工作電話) _____ Cell Phone(手提電話) _____

Spouse's Name (配偶姓名) _____ Age (年齡) _____ 歲 F 男 FM 女

Social Security Number (工咭號碼) _____

Work Phone(工作電話) _____ Cell Phone(手提電話) _____

Address (地址) _____

Home Phone(住宅電話) _____ Email _____

Language (語言) 粵語 Cantonese 國語 Mandarin 英文 English 其它 Others

NOTES: (to be filled at meeting) _____

CONFIDENTIAL

8. Mutual Funds (共同基金) In Non-Retirement Accounts

Fund Name (基金名字)	Original Investment (原本投資價)	Market Value (現時市價)
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

9. IRA, 401(k), 403(B) & Other Retirement Accounts

(所有退休金戶口, 請攜帶最新月結單)

Name of Company where the account is opened (退休戶口公司)	Type 401k, IRA, 403b (種類)	Value (價值)
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

10. Life Insurance (人壽保險)

(請攜帶最近期的年結單)

Insurance Company (保險公司)	Type(種類) (Term, Whole, VUL)	Death Benefit (理賠額)	Cash Value (儲蓄價值)	Annual Premium (每年保費開支)
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

11. Annuities (年金戶口) Fixed and Variable

(請攜帶最近期戶口的年結單)

Insurance Co. (保險公司)	Original Investment (開戶口數目)	Date Purchased (開戶口日期)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

12. Long Term Care Insurance Policy / Rider: _____

下列資料只適宜信託專用

信託繼續執行人 (Successor Trustee)

姓名 (Name)

關係(Relationship)

_____	_____
_____	_____
_____	_____
_____	_____

遺產繼承及分配 (Estate Distribution)

