Law Offices

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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 ______________________________________

______________________________________________

______________________________________________

| Children (兒女姓名) | M / F 男/女 | Date of Birth (出生日期) |
|---|---|---|
| ____________ | ______ | ______ |
| ____________ | ______ | ______ |
| ____________ | ______ | ______ |
| ____________ | ______ | ______ |

## 1. 財稅規劃基本問題

| | Yes | No |
|---|---|---|
| 您有沒有設立生前信託( Do you have a Living Trust) ? | ☐ | ☐ |
| 您有沒有設立遺囑 (Do you have a will)? | ☐ | ☐ |
| 您有沒有出租物業(Do you have income from Real Estate)? | ☐ | ☐ |
| 您有沒有會計師(Do you have an Accountant)? | ☐ | ☐ |
| 您需要照理小孩或年老父母嗎? (Do you expect to care for a child or parent)? | ☐ | ☐ |
| 您將會繼承一筆遺產嗎(Do you expect an inheritance) | ☐ | ☐ |
| 您有沒有長期護理保險(Do you have Long Term Care protection) | ☐ | ☐ |

您的股票戶口存放在那間公司 You invest your stocks in:

☐ Merrill Lynch ☐ T.D. Waterhouse ☐ Charles Schwab

☐ BankAmerica ☐ Fidelity Investment ☐ E-Trade

☐ Paine Weber ☐ Salomon Smith Barney ☐ Others

## 2. 財稅規劃目標 Financial Planning Objectives

退休年齡/ 預計退休年齡 Retire Age 自己(you) 配偶 (spouse)

請表明您對下列理財範圍的關注程度:

| | 絕不關注 Not Concerned | | | | | | | | | 十分關注 Very Concerned |
|---|---|---|---|---|---|---|---|---|---|---|
| 爲兒女生活教育規劃 (Planning for children ) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 爲兒孫生活教育規劃 (Planning for grandchildren | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 減低現時入息(Reducing Current Income) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 遺產信託及遺產稅規劃(Estate Planning) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 財富官司保障規劃 (Desire for Professional Management) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 風險性投資管理(Maximum Growth) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 保守性投資管理 (Combined Growth & Income) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

**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:** ____________________

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# 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)**