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Dear Internet User:

We are pleased that you have selected Edge & Kimbell to assist you in developing an estate plan for your family. It is really remarkable how many problems can be solved and how much money can be saved with proper planning.

In order for us to meet your specific objectives in the most timely and inexpensive manner, it would be helpful if you would complete the attached Estate Planning Data Forms and return them to me, either by mail or by fax. Much of the information requested may not apply to your situation, and you may simply leave those areas blank. It is not important if you do not have all of the information and approximate values will often suffice.

When we do meet for an initial conference, or otherwise communicate about your situation, please bring or transmit copies of as many of the documents listed on the Forms List as are available to you and applicable to your situation.

The package of documents which we generally prepare are 1) a Will, 2) either a Durable Power of Attorney for Health Care, and 3) a general power of attorney (if applicable). These documents together will help you avert many problems which you might face in the future without proper planning.

After you have sent your forms to me, we can then schedule a time to get together and talk about any question you might have and develop a plan and appropriate documents. Please do not hesitate to contact us if you have any questions or need further information.

Sincerely,
B. Blake Edge
John A. Kimbell

WILL AND ESTATE PLANNING DATA FORMS
(Please print legibly)

Date: ____/____/____

PART I. GENERAL INFORMATION

HUSBAND

WIFE

- | | | |
|--|--|--|
| 1. Full Names: | | |
| 2. Home Address: | | |
| | | |
| 3. Home Phone: | | |
| 4. Employer: | | |
| 5. Office Address: | | |
| | | |
| 6. Office Phone: | | |
| 7. Date of Birth: | | |
| 8. Social Security #: | | |
| 9. Date of Marriage: | | |
| 10. How long have you lived in Georgia? | | |
| 11. In what other states have you resided? | | |

12. All Children and Other Dependents (including persons who are partially or wholly dependent upon one or both of you for support now or possibly in the future):

Please include name, relationship to you, if presently a dependent on you, date of birth, marital status, and number of children:

Full Name	Relationship	Dependent ?	DOB	Married?	#Children
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

13. Do you contemplate the birth or adoption of another child?

PART II. PLAN OF WILL

14. Briefly describe to whom you wish to leave your property (e.g. your immediate family only? your grandchildren? other relatives and friends? charitable bequests? Any specific items to go to specific persons):

15. For each person whom you would consider as a guardian for your minor child or children under your will, please list name, age, relationship to you, and occupation.

Name	Age	Relationship	Occupation
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

16. For each person whom you would consider as an executor of your estate, please list name, age, relationship to you, and occupation.

	Name	Age	Relationship	Occupation
1st	_____	_____	_____	_____
2nd	_____	_____	_____	_____
3rd	_____	_____	_____	_____

17. For each person whom you would consider as a trustee of any trust created under your will, please list name, age, relationship to you, and occupation.

	Name	Age	Relationship	Occupation
1st	_____	_____	_____	_____
2nd	_____	_____	_____	_____
3rd	_____	_____	_____	_____

PART III. FINANCIAL INFORMATION

We ask you to summarize your assets, liabilities and net worth on this page. The work sheets which follow will simplify this task and help you summarize the current value of your estate and, where, applicable, that of your spouse.

ASSETS

	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
Market value of stocks and bonds	\$ _____	\$ _____	\$ _____
All bank accounts	\$ _____	\$ _____	\$ _____
Value of real estate	\$ _____	\$ _____	\$ _____
Value of ownership in business or professional practices	\$ _____	\$ _____	\$ _____
Value of home(s)	\$ _____	\$ _____	\$ _____
Automobiles	\$ _____	\$ _____	\$ _____
Profit sharing plan; other employee benefits	\$ _____	\$ _____	\$ _____
Personal effects (furniture, silverware, art, jewelry, etc.)	\$ _____	\$ _____	\$ _____
Miscellaneous (please explain)	\$ _____	\$ _____	\$ _____
<hr/>			
TOTAL ASSETS	\$ _____	\$ _____	\$ _____
	Husband	Wife	Joint

LIABILITIES

	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
Loans and notes to:			
Banks	\$ _____	\$ _____	\$ _____
Insurance Policies Loans	\$ _____	\$ _____	\$ _____
Other indebtedness: _____	\$ _____	\$ _____	\$ _____

Mortgages on residences (balance)	\$ _____	\$ _____	\$ _____
Other liabilities (include any threatened or pending litigation and please explain below)	\$ _____	\$ _____	\$ _____
TOTAL LIABILITIES	\$ _____	\$ _____	\$ _____
	Husband	Wife	Joint

NET WORTH/NET ESTATE CALCULATIONS

	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
Total assets (above)	\$ _____	\$ _____	\$ _____
(MINUS)			
Total liabilities (above)	- _____	- _____	- _____
NET WORTH/NET ESTATE	\$ _____	\$ _____	\$ _____
(PLUS)			
Face value of life insurance	+\$ _____	+\$ _____	+\$ _____

**IMPORTANT DOCUMENTS
TO BRING TO INITIAL MEETING**

Please try to bring to our conference copies of as many of these documents as are available to you and applicable to your situation:

- (a) Your present wills;
- (b) Life Insurance and annuity policies;
- (c) Deeds to real property;
- (d) Summary of employee benefit plans and other employee contracts;
- (e) Buy-sell, partnership and shareholders agreements;
- (f) Promissory notes or other loan agreements for debts owed to or by you;
- (g) Trust agreements to which you are a party or a beneficiary; and
- (h) Any other documents that might be of significance.