

ESTATE PLANNING QUESTIONNAIRE

The first step in your estate plan is gathering extensive information about your property, family and goals. By completing this questionnaire, you can help ensure that you have the estate plan that best fits your needs and reduce the legal expense of conference time.

The questionnaire is necessarily detailed. If a section is not pertinent to your situation, mark "N/A" in that case. Please complete the pertinent sections prior to our meeting.

I. Family Information

A. Personal:

	Husband	Wife
(1) Full Name	_____	_____
(2) Address	_____ _____	_____ _____
(3) Home Phone	_____	_____
(4) Email	_____	_____
(5) Employer	_____	_____
(6) Work Address	_____ _____	_____ _____
(7) Work Phone	_____	_____
(8) Position	_____	_____
(9) Fax Number	_____	_____
(10) SS#	_____	_____
(11) DOB	_____	_____
(12) US Citizen?	_____	_____
(13) Marital Status	_____	_____
(14) Prior Marriage	_____	_____
Please list dates of Marriage & name of Former spouse:	_____ _____	_____ _____

B. Children (indicate if adopted or by prior marriage):

	<u>Name and Address</u>	<u>Birth Date</u>	<u>SS#</u>
(1)	_____	_____	_____

(2)	_____	_____	_____

(3)	_____	_____	_____

(4)	_____	_____	_____

C. Grandchildren (indicate if adopted or by prior marriage):

	<u>Their Parents</u>	<u>Name</u>	<u>Birth Date</u>	<u>SS#</u>
(1)	_____	(a) _____	_____	_____
	_____	(b) _____	_____	_____
		(c) _____	_____	_____
(2)	_____	(a) _____	_____	_____
	_____	(b) _____	_____	_____
		(c) _____	_____	_____
(3)	_____	(a) _____	_____	_____
	_____	(b) _____	_____	_____
		(c) _____	_____	_____

II. PROFESSIONAL ADVISORS

	Name	Phone Number	Address
A. CPA	_____	_____	_____ _____
B. Insurance Advisor	_____	_____	_____ _____
C. Financial Advisor	_____	_____	_____ _____
D. Banker	_____	_____	_____ _____
E. Physician	_____	_____	_____ _____
F. Other	_____	_____	_____ _____

III. PROPERTY INFORMATION

Please list total values for each type of property, net of any debts owed on such property, and insert amounts in the blank under the owner of the property. Please also bring a more detailed listing of assets and values to our meeting.

	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
A. Cash and Bank Accounts (e.g., CDs, Savings)	_____	_____	_____
B. Personal Property (e.g., Furniture, Cars)	_____	_____	_____
C. Marketable Investments (e.g., Stocks, Bonds)	_____	_____	_____
D. Closely Held Business Interests	_____	_____	_____
E. Life Insurance (e.g., Group Term, Individual)	_____	_____	_____
F. Retirement Plans (e.g. Pensions, IRAs)	_____	_____	_____
G. Real Estate (e.g., Residence, Vacation Home)	_____	_____	_____
H. Other	_____	_____	_____
Totals	_____	_____	_____

IV. DISTRIBUTION OBJECTIVES

A. Upon your death, how and to whom do you want your assets distributed? _____

B. If you both were to die prematurely, would you want your children to receive your property outright and free of trust? If you prefer a trust, at what age or ages should your property be distributed to them (e.g. 1/3 at 25, 1/3 At 30, balance at 35)? _____

C. If the persons named in paragraph A did not survive you, whom would you like to receive your assets? Siblings? Nieces and nephews? Charity? _____

V. DESIGNATION OF FIDUCIARIES

A. Whom do you wish to designate as the Executor of your estate?

1. Husband's Estate _____

Successor _____

2. Wife's Estate _____

Successor _____

B. Whom do you wish to designate as the Trustee for the benefit of your children?

1. Trustee _____

2. Successor _____

C. Whom do you wish to designate as Guardian for you minor children if both of you are deceased?

1. Guardian _____

2. Successor _____

D. Whom do you wish to designate as your Attorneys-in-Fact in your Powers of Attorney?

- 1. Husband's attorney-in-fact _____
Successor _____
- 2. Wife's attorney-in-fact _____
Successor _____

E. Whom do you wish to designate as your Health Care Agents in your Health Care Powers Attorney?

- 1. Husband's agent _____
Successor _____
- 2. Wife's agent _____
Successor _____

VI. ATTACHED DOCUMENTS

Attached or N/A

A. Existing Estate Planning Documents

- 1. Wills _____
- 2. Powers of Attorney _____
- 3. Health Care Powers of Attorney _____
- 4. Living Wills _____
- 5. Trust Agreements _____

B. Life Insurance Policies _____

C. Retirement Plan & IRA Information _____

D. Premarital, Separation and Divorce Documents _____

F. Instruments creating tenancy by the entireties or survivorship interest
(e.g., deeds, bank accounts) _____

