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Date of initial meeting

Referred by

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ESTATE PLANNING QUESTIONNAIRE

(Please do not let the length and detail of this questionnaire deter you from completing the process and preparing to meet with us. If you do not know what is intended or do not have the information at hand, skip it and go on to the rest, we can complete the process with you by general discussion at the time of our initial meeting.)

I) GENERAL INFORMATION

- 1) Full name: _____
- 2) Other names known by, if any: _____
- 3) Date of birth: _____
- 4) Social Security Number: _____
- 5) Home telephone number: _____
- 6) Work telephone number: _____
- 7) Cell phone number: _____
- 8) Home mailing address: _____

- 9) County of residence: _____
- 10) E-mail address: _____
- 11) Citizenship: _____
- 12) Other states previously resided in: _____

13) Have you made a will, signed a trust, or executed a power of attorney or any other estate planning document before?*

14) Have you been married before?*

Name of Spouse: _____ (Please indicate if Widowed, Divorced or Legal Separated)
(If widowed please list DOD)

15) Have you ever entered into a pre-or post-nuptial agreement?*

	<u>CHILDREN'S NAME</u>	<u>CHILDREN'S DOB</u>
16) Names of children and birthdays born as issue to you or legally adopted	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____

17) Have you ever made a gift in excess of \$10,000?

18) Do you anticipate receiving an inheritance? (yes/no)
Approximate size?

19) Are you a trust beneficiary?*

20) Do you own property located in another state?

* If you answered "yes" to any of these questions, please bring a copy of the prior will, nuptial agreement, separation agreement, decree of dissolution, trust agreement, or other applicable document with you to our initial meeting.

II) BENEFICIARIES

When we meet to discuss your estate planning, I will review with you in detail the various ways property can be distributed upon your death. For now, however, please list the names of the persons, groups of persons, or entities (including charitable organizations) that you would like to benefit from your estate upon your death or upon the death of the surviving spouse.

- 21) Specific beneficiaries. List the persons or entities to which you wish to make gifts of cash or real property upon your death.

- 22) Residuary beneficiaries. List the persons, or entities to which you wish to leave the remainder of your estate after specific bequests are made.

- 23) Contingent beneficiaries. If none of the residuary beneficiaries is living or is in existence at the time of your death, to whom or to what entities do you want your estate to pass?

III) FIDUCIARIES

In the course of your estate planning, you will be required to select fiduciaries, which are individuals or entities entrusted to act on your behalf in some capacity, such as to administer assets of your estate upon your death, to administer trust assets on behalf of beneficiaries, to make health care decisions for you if you are unable to make those decisions yourself, or to take care of your minor children in the event that you are unable to do so. Below, I have asked you to supply names and addresses for the persons whom you have selected for such fiduciary positions. In addition, please list the appointed fiduciary's relationship to you. When choosing a fiduciary, please note that it is often appropriate for a surviving spouse to act in such capacity

and that you can name more than one person to act as a fiduciary. If you are having trouble choosing fiduciaries, feel free to skip over this section. I will go over each fiduciary position in detail when we meet to discuss your estate planning.

Personal representative: Often called an “executor,” a personal representative has broad powers to administer and distribute your property after your death.

24) Personal representative: _____

25) Successor personal representative: _____

Trustee: A trustee is a person or entity who administers and distributes property held in a trust. A trust may be established under your will for a variety of purposes such as for tax purposes or for the purpose of administering property that would otherwise pass outright to minor children.

26) Proposed trustee: _____

27) Successor trustee: _____

Guardian: A guardian is a court approved individual who makes decisions regarding a minor child’s support, care, education, health, and welfare.

28) Guardian: _____

29) Successor guardian: _____

Agent with financial power of attorney: An agent with financial power of attorney is a person authorized to make financial decisions for you during your life. The power of attorney document can authorize your agent to assist you in making those decisions for yourself while you have capacity or to make those decisions for you in the event that you are incapacitated.

30) Agent with financial power of attorney: _____

31) Successor agent with financial power of attorney: _____

Agent with medical power of attorney: An agent with medical power of attorney is a person authorized to make medical and healthcare decisions for you during your life. The power of attorney document can authorize your agent to assist you in making those decisions for yourself while you have capacity or to make those decisions for you in the event that you are incapacitated.

32) Agent with medical power of attorney: _____

33) Successor agent with
34) Medical power of attorney: _____

IV) ASSETS

Please review the list of the following assets. It is not necessary to provide the values of each, but for estate and death tax planning matters, we need to know the approximate value of the assets held by you individually and jointly with another person. You may use the blanks below to assist you in reaching that calculation or you may give us an approximation of the totals for each column at lines 63 & 71 below, which is sufficient for our initial review of estate planning issues with you. (In making those determinations, please remember that the date of death values of life insurance policies as shown at line 62 below are included for estate tax purposes.) If you have any questions about the information requested below, please feel free to make a note and I will discuss it with you in detail when we meet.

	<u>CLIENT</u> _____	<u>JOINT</u> _____
35) Cash	_____	_____
36) Checking Accounts	_____	_____

- 37) Savings Accounts _____
- 38) CDs _____
- 39) Money Market Funds _____
- 40) Stocks & Stock Funds _____
- 41) Taxable Bonds/Bond
Funds _____
- 42) Retirement Funds
Beneficiaries: _____
- 43) 401(k) Plans
Beneficiaries: _____
- 44) IRAs
Beneficiaries: _____
- 45) Keoghs
Beneficiaries: _____
- 46) Annuities
Beneficiaries: _____
- 47) Primary Residence _____
- 48) Secondary Residence _____
- 49) Other Real Estate _____
- 50) Copyrights, Royalties,
Patents, Trademarks,
and other Tangible
Rights _____
- 51) Long-term Care
Insurance: _____
- 52) Motor Vehicles _____
- 53) Boats _____
- 54) Aircraft _____

- 55) Sports and Hobby Equipment _____
- 56) Household Possessions (Antiques, artwork, jewelry, collections, etc.) _____
- 57) Interests in Trusts _____
- 58) Family Business _____
- 59) Other Business Interests _____
- 60) Property subject to a power of appointment _____
- 61) Other _____
- 62) Life Insurance DOD Value _____
- 63) TOTAL ASSETS** _____

V) LIABILITIES

- 63) Real Estate Mortgage _____
- 64) Auto Loans _____
- 65) Business Loans _____
- 66) Educational Loans _____
- 67) Other Long-term Debt _____
- 68) Credit Card Debt _____
- 69) Personal Loans _____
- 70) Other Short-term Debt _____
- 71) TOTAL LIABILITIES** _____

