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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

	<u>CLIENT A</u>	<u>CLIENT B</u>
1) Full name:	_____	_____
2) Other names known by, if any:	_____	_____
3) Date of birth:	_____	_____
4) Date of marriage, if applicable:	_____	_____
5) Social Security Number:	_____	_____
6) Home telephone number:	_____	_____
7) Work telephone number:	_____	_____
8) Cell phone number:	_____	_____
9) Home mailing address:	_____ _____	_____ _____
10) County of residence:	_____	_____
11) E-mail address:	_____	_____
12) Citizenship:	_____	_____
13) Other states previously resided:	_____	_____

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.

CLIENT A

CLIENT B

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

_____	_____
_____	_____
_____	_____
_____	_____

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

_____	_____
_____	_____
_____	_____
_____	_____

- 24) 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.

	<u>CLIENT A</u>	<u>CLIENT B</u>
25) Personal representative:	_____	_____
	_____	_____
	_____	_____
26) 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.

27) Proposed trustee:	_____	_____
	_____	_____
	_____	_____
28) Successor trustee:	_____	_____
	_____	_____
	_____	_____

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

29) Guardian:	_____	_____
	_____	_____
	_____	_____
30) 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.

	<u>CLIENT A</u>	<u>CLIENT B</u>
31) Agent with financial power of attorney:	_____	_____
	_____	_____
	_____	_____
32) 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.

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

IV) ASSETS

Please review the list of the following assets owned, whether by each of you separately, or jointly. 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 each of you individually and jointly. 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 A</u>	<u>CLIENT B</u>	<u>JOINT</u>
36) Cash	_____	_____	_____
37) Checking Accounts	_____	_____	_____
38) Savings Accounts	_____	_____	_____
39) CDs	_____	_____	_____
40) Money Market Funds	_____	_____	_____
41) Stocks & Stock Funds	_____	_____	_____
42) Taxable Bonds/Bond Funds	_____	_____	_____
43) Retirement Funds	_____	_____	_____
Beneficiaries:	_____	_____	_____
44) 401(k) Plans	_____	_____	_____
Beneficiaries:	_____	_____	_____
45) IRAs	_____	_____	_____
Beneficiaries:	_____	_____	_____
46) Keoghs	_____	_____	_____
Beneficiaries:	_____	_____	_____
47) Annuities	_____	_____	_____
Beneficiaries:	_____	_____	_____
48) Primary Residence	_____	_____	_____
49) Secondary Residence	_____	_____	_____
50) Other Real Estate	_____	_____	_____
51) Copyrights, Royalties, Patents, Trademarks, and other Tangible Rights	_____	_____	_____
52) Long-term Care Insurance:	_____	_____	_____

	<u>CLIENT A</u>	<u>CLIENT B</u>	<u>JOINT</u>
53) Motor Vehicles	_____	_____	_____
54) Boats	_____	_____	_____
55) Aircraft	_____	_____	_____
56) Sports and Hobby Equipment	_____	_____	_____
57) Household Possessions (Antiques, artwork, jewelry, collections, etc.)	_____	_____	_____
58) Interests in Trusts	_____	_____	_____
59) Family Business	_____	_____	_____
60) Other Business Interests	_____	_____	_____
61) Property subject to a power of appointment	_____	_____	_____
62) Other	_____	_____	_____
63) Life Insurance DOD Value	_____	_____	_____
63) TOTAL ASSETS	_____	_____	_____

V) LIABILITIES

	<u>CLIENT A</u>	<u>CLIENT B</u>	<u>JOINT</u>
64) Real Estate Mortgage	_____	_____	_____
65) Auto Loans	_____	_____	_____
66) Business Loans	_____	_____	_____
67) Educational Loans	_____	_____	_____
68) Other Long-term Debt	_____	_____	_____

69)	Credit Card Debt	_____	_____	_____
70)	Personal Loans	_____	_____	_____
71)	Other Short-term Debt	_____	_____	_____
72)	TOTAL LIABILITIES	_____	_____	_____

ADDITIONAL NOTES OR COMMENTS:
