

Questionnaire for Estate Planning

I. *Personal and Family Information:*

A. *Client's Full Name:* _____

B. *Spouse's Full Name:* _____

C. *Address:* _____

D. *Phone Number: Work:* _____

Home: _____

Cellular: _____

E. *Former Spouse, if any:* _____

F. *Is the prior spouse now living, or were you divorced? (Date of Divorce)* _____

G. *Names and Dates of Birth of Client's Children and city where they reside:*

<u>Name</u>	<u>Date of Birth</u>	<u>City and State Residence</u>
_____	_____	_____, _____
_____	_____	_____, _____

_____, _____, _____
_____, _____, _____
_____, _____, _____

H. Are you and your spouse both U.S. Citizens? _____

I. Other important personal information (i.e., long-term medical problem, etc.):

II. Financial Assets:

A. Real Property

1. Address of Personal Residence: _____

How Title is Held: _____

Estimated Fair Market Value: _____

Mortgage Balance: _____

2. *Address of Other Residence or
Vacation Home:* _____

How Title is Held: _____

Estimated Fair Market Value: _____

Mortgage Balance: _____

3. *Address of Other Real Property:* _____

How Title is Held: _____

Estimated Fair Market Value: _____

Mortgage Balance: _____

4. *Property held jointly with any other person or partnership:*

B. *Cash and Deposits (account numbers and name and address of bank or
financial institution):*

(1) *Checking:* _____

(2) *Savings:* _____

(3) *Certificates
of Deposit:* _____

(4) *Other:* _____

C. *Pensions, Profit Sharing, IRAs, ESOPs:*

(1) *Pension Plan/Profit Sharing Plan:*

(You): _____

Value: _____

(Spouse): _____

Value: _____

(2) Retirement or Other Plans:

(You): _____

Value: _____

(Spouse): _____

Value: _____

D. Insurance:

(1) You: Insurance Co.: _____

Policy Number: _____

Face Value: _____

Cash Value: _____

Loans Against: _____

Beneficiaries: _____

(2) Spouse: Insurance Co.: _____

Policy No.: _____

Face Value: _____

Cash Value: _____

Loans Against: _____

Beneficiaries: _____

E. Investment Assets:

(1) Stocks/Bonds: _____

Owner: _____

Name of Stock/Bond: _____

Estimated Value: _____

Owner: _____

Name of Stock/Bond: _____

Estimated Value: _____

F. Automobiles (make, year, value, lien, how title is held):

(1) _____

(2) _____

(3) _____

G. Significant Personal Property (i.e., furniture, art, jewelry, antiques, collections, etc.):

(1) _____

(2) _____

(3) _____

(4) _____

(5) _____

III. Current Affiliation with Any Trusts:

Please identify any trusts with which you are associated:

A. Name of Trust: _____

Date Formed: _____

Trustees: _____

Beneficiaries: _____

Significant Terms:

Assets Held by Trust:

B. Other Current or Future Assets and Liabilities (notes receivable, business interests, anticipated inheritances):

Please identify any significant assets or liabilities you anticipate in the future:

IV. Guardians, Executors, Trustees, and Attorney-in-Fact:

A. Guardians of Minor Children (must be 18 year of age or older)

(1) If you have minor children, whom do you desire to be their guardian?
(Name and Address):

(2) Successor Guardian(s): _____

B. Personal Representative

(1) Name and Address of Personal Representative (Executor) (Person who winds-up your estate at your death; Must be 21 year of age):

(2) *Successor Personal Representative:* _____

C. Trustee

(1) *Name and Address of Trustee (Person who administers any trusts established by your Will):*

(2) *Successor Trustee:* _____

D. *Financial Attorney-in-Fact*

(1) *Name and Address of Person to Whom You Will Give a Durable Power of Attorney (Person to act in your name in financial matters if you become incapacitated):*

(2) *Successor Financial Attorney-in-Fact:* _____

E. *Medical Attorney-in-Fact*

(1) *Name and Address of Person to Whom You Will Give a Medical Power of Attorney in the event you become incapacitated:*

(2) *Successor Financial Attorney-in-Fact:* _____

V. *Dispositive Provisions:*

A. *Specific Requests*

Do you have any property which you would like to give to any specific person? If so, please describe:

B. *Please describe how you would like your property distributed at your death:*

C. *If you have children under age 18, a trust may be used in your estate planning.*

(1) *At what age(s) would you like trust assets distributed to your children? _____*

(2) *What are some of the things you feel are important for the successor Trustee to use the assets of your trust to benefit your children? (i.e., sports, music, college, car, wedding celebration, first home, etc.)*

VI. *Other Matters:*

Please identify any other items, facts, or matters that you believe are important for me to know, but are not covered by the above questions:
