

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

INSTRUCTIONS:

PLEASE COMPLETE THIS QUESTIONNAIRE TO THE BEST OF YOUR ABILITY. THIS INFORMATION WILL ASSIST THE ATTORNEY IN CREATING AN ESTATE PLAN SPECIFIC TO YOUR NEEDS AND SITUATION.

A. PERSONAL INFORMATION

	Husband	Wife
1. Full legal name	_____	_____
2. Other name(s) used	_____	_____
3. Addresses:		
a. Principal residence	_____ _____ _____	_____ _____ _____
b. Business	_____ _____ _____	_____ _____ _____
4. Contact Information:		
a. Home	_____	_____
b. Office	_____	_____
c. Cell	_____	_____
d. Email	_____	_____
	Preferred method of contact	Preferred method of contact
	Home Office	Home Office
	Cell Email	Cell Email
5. Social Security No.:	_____	_____
6. Date of Birth	_____	_____
7. Date of Marriage	_____	_____
8. Was a Prenuptial or Postnuptial Agreement executed	Yes	No

Husband

Wife

9. Profession _____
Active Retired Active Retired

10. Are you a US Citizen Yes No Yes No

If no, indicate country of citizenship _____

B. PRIOR MARRIAGES (In the event of divorce, please bring a copy of your Divorce Decree and any other related documents to your meeting.)

Husband

Wife

1. Former Spouse _____

2. Marriage Date _____

3. Date Marriage Terminated _____

a. By Divorce _____

b. By Death _____

C. CHILDREN/GRANDCHILDREN

1. Name of Child _____ DOB: _____
Single Married Divorced Widowed

Spouse's Name _____
Address _____

List the names of any Grandchildren from this Child:

a. _____ b. _____
c. _____ d. _____

2. Name of Child _____ DOB: _____
Single Married Divorced Widowed

Spouse's Name _____
Address _____

List the names of any Grandchildren from this Child:

a. _____ b. _____
c. _____ d. _____

3. Name of Child _____ DOB: _____
Single Married Divorced Widowed

Spouse's Name _____

Address _____

List the names of any Grandchildren from this Child:

a. _____ b. _____
c. _____ d. _____

4. Name of Child _____ DOB: _____
Single Married Divorced Widowed

Spouse's Name _____

Address _____

List the names of any Grandchildren from this Child:

a. _____ b. _____
c. _____ d. _____

D. WILL PROVISIONS (to be discussed during your meeting)

1. **Executors** (Person who will handle the probate of your Will and administer your Estate)

Husband

Wife

a. **Initial Executor** *(Normally this is husband and wife, for example in husband's Will the wife would serve as initial executor and vice versa)*

Name(s)

Name(s)

b. **First Successor** _____
(The person you would like to appoint as alternate should your initial executor be unable to serve.)

c. **Second Successor** _____
(The person you would like to appoint as alternate should your first alternate be unable to serve.)

2. **Trustees** (Person who will handle the trust created for children)

Husband

Wife

a. Initial Trustee _____

(Normally this is husband and wife)

b. First Successor _____

(The person you would like to appoint as alternate should your initial executor be unable to serve.)

c. Second Successor _____

(The person you would like to appoint as alternate should your first alternate be unable to serve.)

3. **Guardians** (Person who will raise any child of yours who is not of the age of majority)

a. Initial Guardian _____

b. First Successor _____

c. Second Successor _____

4. **Trust for Children** *(The choice of age distributions is your decision. The most common age choice for distributions is at age 25, 30 and 35. This will be discussed at your meeting and can be determined at that time, when the attorney has explained everything to you and you have a better understanding of how it works.)*

a. Discretionary Income Until Age _____

b. Principal Distributions at Ages _____, _____ and _____

E. **POWERS OF ATTORNEY** - Powers of Attorney appoint an individual to handle your business affairs in the event you are unable to handle same on your own.

Husband

Wife

a. Initial Attorney _____

b. First Alternate _____

(The person you would like to appoint as alternate should your initial attorney be unable to serve.)

c. Second Alternate _____

(The person you would like to appoint as alternate should your first alternate be unable to serve.)

F. HEALTH CARE AGENT FORMS - Health Care Agent forms appoint an individual to make medical decisions on your behalf in the event you are unable to do so on your own.

	Husband	Wife
a. Initial Agent	_____	_____
b. First Agent	_____	_____
c. Second Agent	_____	_____

G. LIVING WILLS - Living Wills express the desire not to be kept alive by artificial means of life support. This is purely a personal decision. You may or may not decide to execute such a document.

Husband		Wife	
Yes, I want	No, I do not want	Yes, I want	No, I do not want

H. ASSET INFORMATION - Please bring the following documentation with you to your meeting

- A list of your assets is helpful to determine the appropriate tax planning for your specific situation. (For example, any 401(k)'s, IRA's, money market accounts, savings accounts, checking accounts, life insurance policies, stocks, bonds, the amount you paid for your residence, the amount of any capital improvements made to your residence, fair market value of your residence), You should also list next to each account whether said account is held jointly, in your husband's name or in wife's name. These are questions the attorney will ask you during your meeting.
- Copies of any prior documents (Wills, Trusts, Powers of Attorney etc.) that you may have executed.
- Most recent income tax return.
- All prior gift tax returns and statement of all prior gifts.