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ESTATE PLANNING QUESTIONNAIRE

FAMILY INFORMATION

Your name and date of birth:____

Your Social Security Number:____

Spouse's name and date of birth:____

Spouse's Social Security Number:_______________________________________

Home Address:____

County of Residence:____

Phone Number(s): Home: ____________________ Business:_________________

Your occupation and employer:____

Spouse's occupation and employer:____

Children's names and dates of birth: ____________________________________

Names of other dependents: ____

Social Security Number for each dependent:

NAME:________________________________ NUMBER:_____________________________

NAME:________________________________ NUMBER:_____________________________

Special family circumstances (e.g., prior marriage, adopted child, disabled dependent,

special needs, etc.):____

____

FINANCIAL INFORMATION

NOTE: Fill in the blanks below with the approximate current values (best estimates are fine) of your assets. Please note in parentheses any mortgages or liens against an asset:

	Titled in Your Name	Titled in Spouse's Name	Jointly Titled or Untitled Assets
Family Home			
Other Real Estate			
Furnishings, silver, etc.			
Automobiles			
Art, collections, etc.			
Bank Accounts			
Money Market Funds			
Stocks			
Bonds			
Stock/Bond Funds			
Pension/Profit Sharing			
IRA			
Family Business Interest			
Others			

LIFE OR DISABILITY INSURANCE

	Insured	Owner	Beneficiary	Face Amount less loans
Group or through work				

Personal Policies ___________ ___________ ______________ ______________

___________ ___________ ______________ ______________

___________ ___________ ______________ ______________

___________ ___________ ______________ ______________

INCOME INFORMATION

Your income per annum (list all sources): ____

____

Spouse's income per annum (list all sources): ____

____

PRE-CONFERENCE QUESTIONNAIRE

A. Please consider the following issues for our meeting and note in your answers any question the issues raise.

B. Do you have an existing will? If so, have you reviewed your existing will to see which provisions may still apply and which should be changed?

C. Are either you or your spouse a non-U.S. citizen?

D. Have you ever filed a gift tax return?

E. Are you involved in any way with a trust, either as a Settlor (creator), beneficiary, or trustee? If so, please bring a copy of the trust document with you to our meeting.

F. Have you considered making bequests of specific property to anyone in your will(s)?

G. Have you considered making any bequests to charities in your will(s)?

H. Is it likely that you will be receiving an inheritance in the future from a family member or other source?

I. If you have minor children, who should be given the responsibility of raising them if both parents should die before the children reach age 18? (i.e., their guardians)

J. Whom would you choose to probate (administer) your will and distribute your estate on your death? (i.e., your executor/administrator/personal representative)

K. Who should make the investment decisions and determine distribution of any trust that your Will may create, including managing money for your children? (i.e., your trustee)

L. If you create a trust in your will, should your children or grandchildren be given the right to withdraw a certain amount of trust principal at a certain age? (for example: 1/2 at age 25, 1/2 at age 30)

M. Who should be the beneficiaries of your estate if no descendants survive you? Possible choices include parents, siblings, nieces and nephews or charities.

N. Do you have an existing Power of Attorney for financial matters?

O. Who do you trust to make financial decisions for you if you could not?

P. Do you have an existing Power of Attorney for medical decision-making?

Q. Which two people do you trust to make medical decisions for you if you could not?

R. Do you have an existing living will? Do you wish to donate your organs?

S. Have you signed any other Powers of Attorney at any time?

T. If there were no tax consequences, to whom would you give your property and at what time?

U. What questions do you have regarding your estate and financial planning?

V. Where do you keep your valuable papers?

Please put together copies of all relevant documents for our meeting, including:

Will(s)	Deeds to Property
Bank Books	Life Insurance Policies
Powers of Attorney	Living Wills
Stock Certificates	Mutual Fund Documents
Bonds or CDs	Appraisal Documents