

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: _____

Email Address: _____

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)
Bank Books
Powers of Attorney
Stock Certificates
Bonds or CDs

Deeds to Property
Life Insurance Policies
Living Wills
Mutual Fund Documents
Appraisal Documents