



Attorneys at Law

Confidential Estate Planning Questionnaire

FAMILY DATA

Husband's Full Name: _____ Date: _____
DOB: _____ Age: _____
Employer: _____ Phone #: _____
Wife's Full Name: _____ DOB: _____ Age: _____
Employer: _____ Phone #: _____
Home Address: _____ Home Phone #: _____
City County State Zip Code

LIVING CHILDREN

Table with columns: Full Name, DOB, Age, Married, Address. Includes horizontal lines for data entry.

Please note any particulars about children such as stepchildren, children of only one spouse, adopted stepchildren, etc.

DECEASED CHILDREN

GRANDCHILDREN

Table with columns: Full Name, Age, Parents. Includes horizontal lines for data entry.

OTHER POSSIBLE BENEFICIARIES OF YOUR WILL _____

YOU AND YOUR SPOUSE WILL NEED AN EXECUTOR TO ADMINISTER YOUR ESTATE AND MAKE SURE THE PROVISIONS OF YOUR WILL ARE FOLLOWED. THE EXECUTOR MAY BE AN INDIVIDUAL (SPOUSE, CLOSE RELATIVE, FRIEND, ETC.) OR IT MAY BE A CORPORATE FIDUCIARY SUCH AS A BANK. WE RECOMMEND YOU CHOOSE AN EXECUTOR AND A SUCCESSOR EXECUTOR IN THE EVENT THE FIRST EXECUTOR CANNOT OR WILL NOT PERFORM THE DUTIES.

FIRST EXECUTOR: _____ SUCCESSOR EXECUTOR: _____

IF YOU HAVE MINOR CHILDREN WHO SURVIVE BOTH PARENTS, YOU WILL NEED TO SELECT A GUARDIAN. THE GUARDIAN IS THE PERSON WHO WOULD BE RESPONSIBLE FOR AND WOULD MAKE PERSONAL DECISIONS RELATING TO YOUR CHILDREN SUCH AS WHERE THEY WOULD LIVE, WHERE THEY WOULD ATTEND SCHOOL, ETC. IT IS ALSO RECOMMENDED THAT YOU CHOOSE A SUCCESSOR GUARDIAN IN THE EVENT THAT THE FIRST GUARDIAN CANNOT SERVE.

FIRST GUARDIAN: _____ SUCCESSOR GUARDIAN: _____

IF YOU SET UP A TRUST FUND FOR SOMEONE, YOU WILL NEED TO SELECT A TRUSTEE WHO WILL MANAGE THE TRUST ASSETS AND DISBURSEMENTS. LIKE THE EXECUTOR, THE TRUSTEE CAN BE A PERSON OR A CORPORATE FIDUCIARY. NOTHING PREVENTS YOU FROM CHOOSING THE SAME PERSON OR CORPORATE FIDUCIARY FOR EXECUTOR AND TRUSTEE, OR YOU MAY CHOOSE DIFFERENT PEOPLE OR ENTITIES FOR THESE POSITIONS.

FIRST TRUSTEE: _____ SUCCESSOR TRUSTEE: _____

ESTATE EVALUATION

ASSETS <i>(Please show ownership and estimated value)</i>	Husband	Wife	Joint*
1. Residence	\$	\$	\$
2. Other Real Property (List location by State and County)			
3. Listed or Traded Stocks, Bonds, etc.			
4. Stock in Privately owned Corporation, Partnership, Limited Partnership, or personal business interests			
5. Notes, Mortgages, Private Loans, etc.			
6. Savings and Cash on Hand			
7. Miscellaneous Personal Property (cars, boats, antiques, household furniture, jewelry, silver, coin, stamp or other collections)			
8. Life Insurance (list policies separately on next page)			
9. Other			
TOTAL ASSETS	\$	\$	\$

DEBTS			
1. Mortgages	\$	\$	\$
2. Other			
TOTAL DEBTS			
NET ASSETS:	\$	\$	\$

***NOTE:** For jointly owned property indicate name of person who provided the funds to purchase the property.

A. Life Insurance

	Policy #1	Policy #2	Policy #3	Policy #4
Company				
Type Policy				
Face Amount				
Cash Value				
Owner				
First Beneficiary				
Second Beneficiary				
Loans Against				
Special Features				
Double Indemnity, etc.				
Who pays premium?				

B. Do you own life insurance on the life of your child or children, or any other person? If so, describe policy as on Page 6.

- C. In case of death or retirement, would your employer make any payments to your estate, to your spouse, or any other designated beneficiary under a pension or profit sharing plan or other such company retirement plan? If so, describe plan, amount to be paid, designate beneficiary, current value of vested interest in such plan, and the method of payment.**
- D. Are you or your spouse the beneficiary of any existing trust or do you have any power, as Trustee or otherwise, in any existing trust? If so, please describe.**
- E. Do you stand to inherit any property of a significant nature? If so, please describe.**