

ESTATE PLANNING QUESTIONNAIRE

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PERSONAL AND CONFIDENTIAL

Date _____

Full Name _____

Known by any other names? _____

Date of Birth _____

SSN _____

United States Citizen ___ Yes ___ No

Address _____ Street

_____ City/State/Zip

_____ County

Telephone _____ Home

_____ Office

_____ Cell

Email _____

Occupation _____

Previous Marriages: (give brief details)

Annual Income \$ _____

Spouse's Full Name _____

Known by any other names? _____

Date of Birth _____

SSN _____

United States Citizen ___ Yes ___ No

Telephone _____ Home

_____ Office

_____ Cell

Email _____

Occupation _____

Previous Marriages: (give brief details)

Annual Income \$ _____

Children's Full Name	Age	Marital Status	Names and Ages of Their Children	Place of Residence

Are any children adopted? ___ Yes ___ No

ASSETS (estimated market value)

	Husband	Wife	Joint
Cash	\$ _____	\$ _____	\$ _____
Checking Account	\$ _____	\$ _____	\$ _____
Savings Account	\$ _____	\$ _____	\$ _____
Tangible Personal Property	\$ _____	\$ _____	\$ _____
Investment/Brokerage Account	\$ _____	\$ _____	\$ _____
Stocks	\$ _____	\$ _____	\$ _____
Bonds	\$ _____	\$ _____	\$ _____
Notes & Mortgages Receivable	\$ _____	\$ _____	\$ _____
Residence	\$ _____	\$ _____	\$ _____
Real Estate in this State	\$ _____	\$ _____	\$ _____
Real Estate in Other States	\$ _____	\$ _____	\$ _____
Business Interests	\$ _____	\$ _____	\$ _____
Pension, Profit Sharing, IRA, etc.	\$ _____	\$ _____	\$ _____
Other Property	\$ _____	\$ _____	\$ _____

LIFE INSURANCE

Company	Insured	Beneficiary	Cash Value	Face Amount	Face Amount
				\$	\$
				\$	\$
				\$	\$
				\$	\$

Total Assets \$ _____ \$ _____

LIABILITIES

Notes and Mortgages Payable	\$ _____	\$ _____	\$ _____
Life Insurance Loans	\$ _____	\$ _____	\$ _____
Other Debts	\$ _____	\$ _____	\$ _____
Total Liabilities	\$ _____	\$ _____	\$ _____
NET WORTH (assets minus liabilities)	\$ _____	\$ _____	\$ _____

MISCELLANEOUS PERSONAL INFORMATION

Any expected inheritance(s)? _____

Location of safe-deposit box: _____

List bank(s) where you maintain accounts: _____

Have you or your spouse made any substantial gifts in the past? _____
Give details: _____

Are you or your spouse the beneficiary under any trust? ___ Yes ___ No
Give detail: _____

Are you or your spouse the trustee under any trust? ___ Yes ___ No
Give detail: _____

Have you and your spouse ever lived in a Community Property state (California, Texas, New Mexico, Arizona, Washington, Louisiana, Nevada, Wisconsin or Idaho)? ___ Yes ___ No
Give detail: _____

Do you and your spouse have a pre-nuptial or post-nuptial agreement of any kind concerning the disposition of assets in the event of death or divorce? ___ Yes ___ No
Give detail: _____

	Name	Telephone
Stock Broker	_____	_____
Accountant	_____	_____
Insurance Agent	_____	_____

INFORMATION FOR NEW ESTATE PLAN

PERSONAL REPRESENTATIVE

	Husband	Wife
Primary (usually spouse)	_____	_____
First Alternate	_____	_____
Second Alternate (if any)	_____	_____

TRUSTEE (if applicable)

	Husband	Wife
Primary	_____	_____
Alternate	_____	_____

GUARDIAN FOR MINORS (if applicable)

	Husband	Wife
Primary	_____	_____
Alternate	_____	_____

Desired disposition of assets if survived by your spouse: _____

Desired disposition if you are not survived by your spouse: _____

Desired disposition if you and all immediate family are deceased: _____

Any specific bequests to individuals or charities: _____
