

# CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

**Buhrman Law Firm, P.C.**  
 345 Frazier Avenue, Suite 210  
 Chattanooga, TN 37405  
 Phone: (423) 266-5691 Fax: (423) 265-7041  
[www.buhrmanlaw.com](http://www.buhrmanlaw.com)

**I. FAMILY DATA**

DATE: \_\_\_\_\_

**HUSBAND:** \_\_\_\_\_ **D.O.B.** \_\_\_\_\_ **S.S. #** \_\_\_\_\_

**WIFE:** \_\_\_\_\_ **D.O.B.** \_\_\_\_\_ **S.S. #** \_\_\_\_\_

**CHILDREN (Include age):** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_ **PHONE:** \_\_\_\_\_

**II. ESTATE PLANNING GOALS:** Please describe your overall estate planning goals:

\_\_\_\_\_  
 \_\_\_\_\_

Do any family members or beneficiaries have any disabilities? \_\_\_\_\_

**III. ASSET SUMMARY:** Please use Fair Market Value and round to nearest \$1000.

<u>Asset</u>	<u>Husband's Name</u>	<u>Wife's Name</u>	<u>Joint</u>
Real Estate (Residence)	_____	_____	_____
Real Estate (Other)	_____	_____	_____
Cash, Bank Accounts, CDs, etc.	_____	_____	_____
	_____	_____	_____
Stocks, Bonds, Mutual Funds, Brokerage Accts.	_____	_____	_____
	_____	_____	_____
Household goods, Personal Effects & Misc.	_____	_____	_____

**Tax Deferred Annuities, 401(k) Plans, IRAs and Other Retirement Accounts**

<b>Husband:</b> <u>Description</u>	<u>Value</u>	<u>Primary Beneficiary</u>	<u>Contingent Beneficiary</u>
_____	_____	_____	_____
_____	_____	_____	_____
<b>Wife:</b> <u>Description</u>	<u>Value</u>	<u>Primary Beneficiary</u>	<u>Contingent Beneficiary</u>
_____	_____	_____	_____
_____	_____	_____	_____

**LIFE INSURANCE**

**On Husband's Life:**

Policy Owner	Type	Face Value	Cash Value	Beneficiary	Annual Premium
_____	_____	_____	_____	_____	_____

**On Wife's Life:**

Policy Owner	Type	Face Value	Cash Value	Beneficiary	Annual Premium
_____	_____	_____	_____	_____	_____

**IV. APPOINTMENT OF AGENTS FOR:**

	FINANCIAL POWER OF ATTORNEY		HEALTH CARE POWER OF ATTORNEY	
	Name	Relationship	Name	Relationship
<b>Husband's Choice</b>				
#1	_____	_____	_____	_____
#2	_____	_____	_____	_____
<b>Wife's Choice</b>				
#1	_____	_____	_____	_____
#2	_____	_____	_____	_____

**V. APPOINTMENT OF EXECUTOR** Whom do you want to be in charge of administration of your estate?

	Name	Relationship	Address
<b>Husband's Choice</b>			
#1	_____	_____	_____
#2	_____	_____	_____
<b>Wife's Choice</b>			
#1	_____	_____	_____
#2	_____	_____	_____

**VI. APPOINTMENT OF TRUSTEE** If your will creates a trust for your spouse or other family members, who do you want to manage this inheritance? This can be the same person as your Executor. Trustee choices should be same for both husband and wife.

	Name	Relationship	Address
#1	_____	_____	_____
#2	_____	_____	_____

**VII. APPOINTMENT OF GUARDIAN** Whom do you want to raise your children if both you and your spouse die with minor children?

	Name	Relationship	Address
#1	_____	_____	_____
#2	_____	_____	_____

**VIII. BENEFICIARIES OF SPECIAL GIFTS** Do you want to make a gift—cash or a specific item to a charity, foundation or a religious foundation? Do you want to give any specific items to a family member or other individual?

Name of Beneficiary	Charitable Amount	Specific Gift
_____	_____	_____
_____	_____	_____
_____	_____	_____

**IX. RESIDUARY AND CONTINGENT BENEFICIARIES** Whom do you want to receive the rest of your estate after these special gifts have been distributed? Whom do you want to receive your estate if you and your spouse outlive the people you have named to be the residuary beneficiaries?

Name of Beneficiary	Amount or Percentage	Contingent Beneficiary	Amount or Percentage
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____