

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

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I. **FAMILY DATA:** (Please list your name as you wish to have on legal documents) DATE: _____

HUSBAND: _____ D.O.B. _____ S.S. # _____

WIFE: _____ D.O.B. _____ S.S. # _____

PHONE AND EMAIL: _____

ADDRESS: _____

CHILDREN AND AGES: _____

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.

Asset	<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

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

LIFE INSURANCE

On Husband's Life:

Policy Owner	Type	Value	Beneficiary
_____	_____	_____	_____

On Wife's Life:

Policy Owner	Type	Value	Beneficiary
_____	_____	_____	_____

IV. APPOINTMENT OF AGENTS FOR:

FINANCIAL POWER OF ATTORNEY

HEALTH CARE POWER OF ATTORNEY

Husband's Choice

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

Wife's Choice

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

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

Husband's Choice

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

Wife's Choice

	Name	Relationship	Address
#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
_____	_____	_____	_____
_____	_____	_____	_____