

Estate Planning Questionnaire

Referred by:

Date:

	Self	Spouse
Name (please include all a/k/a's)		
Address		
Social Security Number		
Date of Birth		
Driver's License (state/number)		
Citizenship		
Marriage, if applicable (state/date)		
Telephone (home)		
Telephone (work)		
Telephone (cell)		
Email (home)		
Email (work)		
Employer		
Type of Work		

Children-Names	Date of Birth	Address/Phone/Email	Social Security #

Other Heirs-Names	Date of Birth	Address/Phone/Email	Relationship

Executor(s)-Names	Relationship	Address/Phone/Email	Social Security #

Alt. Executor(s)-Names	Relationship	Address/Phone/Email	Social Security #

Guardian(s)-Names	Relationship	Address/Phone/Email	Social Security #

Alt. Guardian(s)-Names	Relationship	Address/Phone/Email	Social Security #

Trustee-Name	Relationship	Address/Phone/Email	Social Security #

Prior Documents	Date
Last Will & Testament	
Living Trust	
Irrevocable Trust	

Prior Documents	Date
Health Care Directive	
Power of Attorney	
HIPAA Waiver	

Asset/Liability Data: In order to discuss the probate and estate tax aspects of your potential estate, we need to have a rough estimate of your financial situation. This schedule may also be helpful to your executor in administering your estate. ON THE LEFT: describe the assets and liabilities. ON THE RIGHT: identify the owner by listing the value of each asset/liability in the applicable column. The value listed in the right-hand column for real estate should be its value net of any mortgage. Insurance or retirement benefits should appear in the owner's column. Once completed, the value of each asset in each column should be totaled at the bottom of the page.

	NET VALUE		
I. Real Estate	SELF	SPOUSE	JOINT

Description	Approx. Value	Bank	Mortgage Amt			

II. Cash					
Bank	Type of Account				

III. Stocks, Bonds, and Mutual Funds					
No. of Shares	Company				

IV. Life Insurance					
Company	Owner	Insured	Beneficiaries 1 st /2 nd		

V. Retirement Benefits (IRA, 401k, TSA, etc.)					
Company	Type	Owner	Beneficiaries 1 st /2 nd		

VI. Personal Property (significant, valuable, or unusual items)					
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VII. Business Ventures					
Name	Form of Entity	% Ownership			

VIII. Other Significant Liabilities (excl. real estate mortgages)					
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Total: \$			
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Primary Estate Planning Objectives (coordinate asset distribution, tax savings, ease administration costs and delays, liquidity, preserve family business or land, Medicaid planning, Powers of Attorney, Living Wills) _____

Monthly Income	Self	Spouse	Joint
Social Security	_____	_____	_____
Employment	_____	_____	_____
Pension from _____	_____	_____	_____
Other _____	_____	_____	_____

Professional Advisors	Name	Address
Accountant/Tax Preparer	_____	_____
Financial/Investment Advisor	_____	_____
Insurance Agent (last time you met? _____)	_____	_____
Real Estate Broker	_____	_____

Other

Please identify any assets (i.e., bank/brokerage accounts), credit card accounts, email accounts, social networking accounts (i.e., Facebook), sites at which you store photos or documents, domain names, and/or any other assets which you maintain on the internet _____

Have family members been provided with computer passwords, online passwords, user IDs? _____

Safe Deposit Box? Yes _____ No _____ Location _____

I anticipate inheritance from: _____ Approximate amount: \$ _____

I am the legally appointed guardian of: _____

I am serving as executor of an estate: _____

I am involved in a lawsuit: _____

Financial obligations from dissolution of marriage or support actions: _____

Are you or your spouse a veteran? _____

Do you have long-term care insurance? _____

Do you own any handguns, long guns, or other firearms? _____

If you or your spouse has ever lived in a community property state, such as Arizona, California, Idaho, Louisiana, New Mexico, Nevada, Texas, Washington, Wisconsin, please indicate when and which state: _____

What charities or causes do you support by contribution of your time or money? _____

Have you or a family member been in an accident in the last two years? _____

Are you planning on buying or selling real estate in the near future? _____

Do you plan to start or sell a business in the near future? _____