

ESTATE PLANNING QUESTIONNAIRE

CLIENT INFORMATION

Full Legal Name of Individual 1: _____

Full Legal Name of Individual 2: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone #: _____ E-Mail: _____

Current Marital status: _____ Date of Marriage: _____

What is your preferred contact method? Phone Mail Email Other: _____

Do you have current wills? Yes No

If yes, please bring all originals to your first appointment.

FAMILY INFORMATION

Please list the full legal names and ages of all descendants from all relationships. Please also include the names of any *deceased* descendants and whether they had any children.

Legal Name	Child of ?	Age	Living? (Y/N)	# and age(s) of grandchildren

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SUMMARY OF ASSETS

Please list all of your assets on the below form. You may use "ballpark" figures, but it is important that this list is filled out completely, including an indication of the ownership of each asset. If something does not apply, please write N/A.

REAL PROPERTY

Address	Owner(s) (list all)	Purpose? (rental, home, etc.)	Mortgage? (Y/N)

INVESTMENTS (retirement accounts, mutual funds, stocks, bonds, annuities, etc.)

Company	Owner(s)	Transfer on Death Beneficiaries(TOD)	% TOD

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SUMMARY OF ASSETS continued...

BANK ACCOUNTS (checking, savings, etc.)

Company	Owner(s)	Transfer on Death Beneficiaries(TOD)	% TOD

PERSONAL PROPERTY OF VALUE (vehicles, jewelry, guns, antiques, collectibles, etc.)

Item	Owner(s)

BUSINESS INTERESTS

Company	Owners	Ownership %

OTHER ASSETS

Asset	Details

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DISTRIBUTION OF ESTATE

SPECIFIC BEQUESTS

You may provide that a particular asset or item (i.e., jewelry, watch, specific amount of money, etc.) be given to a particular beneficiary upon your death. Please list below the beneficiaries to whom you would like to make a specific bequest and what asset(s) you would like to bequeath those beneficiaries.

Name of Beneficiary	Asset/Item to be conveyed

REMAINDER

Upon gifting any items listed above as specific bequests, the remainder of your estate may be given to a beneficiary or divided among several beneficiaries. The best way to do this is to divide your remaining estate into percentage shares. Please list below the beneficiaries to whom you would like to distribute the remainder of your estate.

Name of Beneficiary	Percentage to be conveyed

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DISTRIBUTION OF ESTATE continued...

CONTINGENT BENEFICIARIES

It is considered best practice in estate planning to provide for a second line of contingent beneficiaries who will receive your estate assets if a primary beneficiary does not survive you. Please list below the beneficiaries to whom you would like to distribute the remainder of your estate if a primary beneficiary (or beneficiaries) do not survive you.

Deceased Beneficiary	Asset	Beneficiary to convey assets to

MINOR BENEFICIARIES

If you have beneficiaries that are minors, you may want to include provisions in your will to create a testamentary trust upon your death. If this is applicable, please indicate which beneficiaries are minors and at what age you would like for the treat assets to be distributed to a minor.

Minor Beneficiary	Required age for disbursement

CHARITABLE BENEFICIARIES

You may make donations from your estate to organizations upon your death. These donations can be for a certain amount (i.e., specific bequest) or for a percentage share (i.e., remainder). They also make good contingent beneficiaries if your primary beneficiaries are no longer living. Please list below any charitable contributions you would like to consider for your estate.

Non-Profit/Charity Name	Item/Amount of Gift

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NOMINATION OF FIDUCIARIES

Your **personal representative** (also called an administrator or executor) is the person who manages your assets after your death, coordinates with the probate court, and distributes your estate according to your Will. The person(s) you name should be someone who you trust to carry out your wishes, who is responsible and can follow through with fiduciary duties and can (potentially) withstand family drama in some cases. I recommend listing at least two (primary and alternate) and sometimes three successive personal representatives. Who would you like to be your personal representative?

	Legal Name of Personal Representative	Relationship
Primary		
Alternate		
Second Alternate		

If you would like to make a revocable living trust or include a testamentary trust in your will you will need to name a **trustee**. A trustee is the person who will manage assets after your death for any minor children, grandchildren, or disabled beneficiaries of your estate, or, for your surviving spouse, as applicable. A trustee may also be appointed to manage your assets during your own lifetime in certain circumstances. Who should be your trustee?

	Legal Name of Trustee	Relationship
Initial Trustee		
Successor Trustee		
Secondary Successor Trustee		

If you have minor children you may want to appoint a **guardian** in your will or trust. A guardian is the person who will take care of your minor children, after your death. Who should be the guardian of your minor children?

	Legal Name of Guardian	Relationship
Primary		
Alternate		

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OTHER ESTATE PLANNING DOCUMENTS

These other documents are included in our simple will estate planning package at no additional charge and are generally good documents to have in place along with your will or trust.

General Durable Power of Attorney

A General Durable Power of Attorney authorizes someone to act on your behalf for financial and medical decisions during your lifetime.

Would you like to appoint someone to act on your behalf?

(You may separate out medical and financial powers)(Primary is generally your spouse or partner)

Name of Individual 1: _____ Yes No
Name of Individual 2: _____ Yes No

Representatives for Individual 1

	Legal Name of Individual you wish to grant power of attorney	Relationship
Primary		
Alternate		
Second Alternate		

Representatives for Individual 2

	Legal Name of Individual you wish to grant power of attorney	Relationship
Primary		
Alternate		
Second Alternate		

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OTHER ESTATE PLANNING DOCUMENTS CONTINUED...

Advance Directive

An Advance Directive, also called a living will or a health care power of attorney, is a document in which you name a health care representative to direct your health care if you are unable to do so yourself. The document also allows you to specify in advance whether or for how long you would like life support and tube feeding administered or continued under certain circumstances.

Do you want an advance directive?

Name of Individual 1: _____ Yes No
Name of Individual 2: _____ Yes No

If you wish to make an advance directive, who would you like to appoint as your health care representative?(Primary is generally your spouse or partner)

Representatives for Individual 1

Primary:		
Legal		
Name: _____	Relationship: _____	
Address: _____		
City: _____	State: _____	Zipcode: _____
Phone Number: _____	Email: _____	
Alternate:		
Legal Name: _____		
Relationship: _____		
Address: _____		
City: _____	State: _____	Zipcode: _____
Phone Number: _____	Email: _____	

Representatives for Individual 2

Primary:		
Legal		
Name: _____	Relationship: _____	
Address: _____		
City: _____	State: _____	Zipcode: _____
Phone Number: _____	Email: _____	

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Alternate:

Legal Name: _____ Relationship: _____

Address: _____

City: _____ State: _____ Zipcode: _____

Phone Number: _____ Email: _____

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