

ESTATE PLANNING QUESTIONNAIRE

Date Prepared: _____

Name: _____

Other names you have used: _____

Address: _____

Telephone Home: _____ Work: _____

Social Security Number: _____

Date of Birth: _____

United States Citizen: Yes _____ No _____

Total Number of Marriages: _____

Spouse's/Domestic Partner's Name: _____

Is Spouse/Domestic Partner a United States Citizen: Yes _____ No _____

Total Number of Children: _____

Full Names and Ages of the Children _____

ESTATE PLANNING CONSIDERATIONS

1. Do you have a current will, trust, power of attorney, living will or health care proxy? If so, which? _____

2. Please indicate your choice for:

Trustee/Trustees of your Irrevocable Trust (someone other than you): _____

Alternate Trustee/Trustees (if Initial Trustee is unable to serve): _____

Trustee of your Revocable Trust (can be you): _____

Alternate Trustee (if Initial Trustee is unable to serve): _____

Executor of your Will: _____

Successor or Alternate Executor: _____

Trustee of Credit Shelter Trust (if beneficiary of Trust, please name a co-Trustee

also): _____

Successor or Alternate Trustee: _____

3. How would you like to distribute your estate: _____

If your first choice of beneficiaries does not survive you, would you like their heirs to receive their portion of your estate? _____ If not, who are your alternate beneficiaries?

Do you have any specific age requirements to receive a bequest? _____ If so, at what ages?

4. Do you want to leave any specific items to any particular people? _____

5. What are your assets? How are they held (jointly, individually, etc.)? What is their approximate value? Who is the beneficiary (IRA, 401k, ITF, POD)?

Real Property: _____

Stocks and Bonds _____

Savings Bonds: _____

Insurance: _____

Trusts: _____

Motor Vehicles: _____

Boats: _____

IRA: _____

401K, pension, Keogh plan, pension, etc.: _____

antiques/personal property: _____

bank accounts: _____

Miscellaneous other assets: _____

6. Do you have any debts? _____

Mortgages (on what and amount) _____

Loans: _____ Amounts _____

Other debts: _____

7. Have you made any gifts within the past three years? Were gift tax returns filed? _____

8. Have you created any trusts? Are you the beneficiary of any trusts? _____

9. Are you custodian of any Uniform Transfers to Minors Accounts? _____ For Whom? _____

10. Do you hold a Power of Attorney for anyone else? _____

11. Who would you like to designate as (include name, address, telephone number and their relationship to you):

Health Care Agent: _____

Alternate: _____

Agent for Power of Attorney: _____

Alternate: _____

Agent for Living Will (Advanced Directive): _____

Alternate: _____

12. Anything you would like for the estate planning attorney to know? _____
