



ESTATE PLANNING QUESTIONNAIRE

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FAMILY AND PERSONAL INFORMATION

General Personal Information

You

Spouse

Full Legal Name: _____

Home address: Street: _____
 City, State & Zip: _____
 Home Phone: _____
 Alternate Phone: _____
 Email: _____
 Alternate Email: _____

Date of Birth: _____
Occupation: _____
Employer: _____

Children

Please provide the following information for ALL of your children, and indicate whether the child is the husband's only (H), the wife's only (W), a child of both (B), or if you are unmarried (NA):

<u>Name</u>	<u>Date of Birth</u>	<u>H/W/B/NA</u>	<u>Address (if not living at home)</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Individuals

Please provide the following information for any other individuals you wish to include in your estate plan:

<u>Name</u>	<u>Relationship</u>	<u>Age</u>	<u>Address</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Are any of the above children or other relatives disabled? Yes _____ No _____

FINANCIAL INFORMATION

A. Assets:

Bank Accounts				
Financial Institution	Name(s) on Account	Payable on Death (POD)? Y/N	If POD, Named Beneficiary	Approximate Balance

* Attach an additional sheet, if necessary.

Total Value: \$ _____

Real Estate			
Description (Residence, Investment, and etc.)	Address (Street, City, State Zip Code)	Name(s) on Deed	Approximate Value

* Attach an additional sheet, if necessary.

** Please provide copy of all deeds.

Total Value: \$ _____

Stocks, Bonds, Treasury Notes, Other Investments (Not Real Property)			
Name on Certificate or Book Entry	Payable on Death (POD)? Y/N	No. of Shares	Approximate Market Value

* Attach an additional sheet, if necessary.

Total Value: \$ _____

Life Insurance, IRAs, Pension, 401(k)				
Type	Financial Institution	Account/Policy Holder & No.	Current Beneficiary	Approximate Face Value

* Attach an additional sheet, if necessary.

Total Value: \$ _____

Business Interests		
Name of Owner	Description (Partnership, LLC, Corporation, etc.)	Approximate Market Value

* Attach an additional sheet, if necessary.

Total Value: \$ _____

Land Contracts, Mortgages, Notes, and Other Receivables (Payable/Owed to YOU)	
Name of Debtor	Current Balance Owed to YOU

* Attach an additional sheet, if necessary.

Total Value: \$ _____

Other Assets (Trusts, Investment Interests, Anticipated Inheritances or Gifts, Lawsuits)		
Description	Name(s) of Owner(s)	Approximate Value

* Attach an additional sheet, if necessary.

Total Value: \$ _____

B. Liabilities:

Personal Liabilities				
	Description of Collateral	Creditor(s)	Name(s) that are personally liable on the debt	Estimate of Total Amount of Liability
Mortgages				
Other secured debts (i.e. auto loans, etc.)				
Unsecured Debts (i.e. credit cards, etc.)				

* Attach an additional sheet, if necessary.

FIDUCIARY SELECTION

Spouse as Fiduciary: It is common for most clients to name their spouse for the remaining fiduciary selections, with other individuals named as “alternates” or “successors.” If this is your intent, check the first box. If you are unmarried, or prefer someone other than your spouse to act as your fiduciary, check the second box.

- ☐ Each spouse shall act as fiduciary for the other, with the below named individuals as successors or alternates.
- ☐ The below named individuals are named in the order of preference, with the first being primary, and the others as successors or alternates.

Personal Representative:

This is the person in charge of handling your affairs after you die. The personal representative’s primary jobs are to collect your assets, pay your creditors and transfer your property to whomever you indicate in your will (typically the trustee of your trust). It should be a person capable of keeping accurate records and who has a basic level of financial knowledge (e.g., knows what mutual funds and life insurance are). This is primarily a short-term job (a few months to a couple of years depending in large part on whether an estate tax return is necessary). Whom would you want to serve as the Personal Representative of your estates?

You:

Spouse:

- | | | |
|----|-------|-------|
| 1. | _____ | _____ |
| 2. | _____ | _____ |
| 3. | _____ | _____ |

Financial Power of Attorney:

A financial power of attorney is a written instrument granting an appointed agent the authority to perform certain specified acts on your behalf. Since a power of attorney confers a great degree of authority and discretion, the agent must be completely trusted.

You:

Spouse:

- | | | |
|----|-------|-------|
| 1. | _____ | _____ |
| 2. | _____ | _____ |
| 3. | _____ | _____ |

Patient Advocate Designation:

A patient advocate designation is a written instrument appointing an agent to make health care decisions when you are incapable of making or communicating such decisions.

You:

Spouse:

- | | | |
|----|-------|-------|
| 1. | _____ | _____ |
| 2. | _____ | _____ |
| 3. | _____ | _____ |

If you intend to have a trust as part of your estate plan:

Trustee:

The requirements for trustee are similar to a personal representative, but it is a longer-term job. The Trustee's job will be to hold the assets for your children, use them for their benefit as you direct, and ultimately transfer them to your children at the ages you select. If a trust is appropriate to your estate plan, whom would you want to serve as the trustee of any trusts? List in order of preference.

1. _____
2. _____
3. _____

If there are minor children:

Guardian:

If you have minor children, whom would you want to serve as their personal guardian in the event of the deaths of both you and your spouse? This is the person or persons who would be responsible for the physical wellbeing of your children. You should name a first choice and a backup. Because the guardian is really a surrogate parent, you should consider the persons' parenting skills. Please list in order of preference.

1. _____
2. _____
3. _____

When naming couples, consider consequences of death of one or divorce

Conservator:

This is the person who is responsible for taking care of your children's assets. This person is not responsible for your assets because your assets would be held in trust for your children. However, it is possible that your children will have assets of their own, for example, wrongful death settlement proceeds. Clients generally use one of two patterns here (A) whoever is serving as the guardian (replacement parent) serves as the conservator or (B) whoever serves as trustee serves as conservator. Keep in mind that the guardian, conservator and trustee can be the same person. Please list in order of preference.

1. _____
2. _____
3. _____