



ESTATE PLANNING QUESTIONNAIRE

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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 debts secured by lien on personal property (i.e. auto loans, etc.)				
Unsecured Debts (i.e. credit cards, etc.)				

* Attach an additional sheet, if necessary.

Total Liabilities: \$ _____

C. Net Worth. Total Assets \$ _____ - Total Liabilities \$ _____ = \$ _____