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PRE-CONSULTATION

# Estate Planning Questionnaire

Please answer the following **optional** questions before our meeting to help make the most of your consultation time. Unsure about some of the terminology? Check out the attached "Four Must Know Louisiana Law Estate Planning Terms" document.

Name \_\_\_\_\_ Phone # \_\_\_\_\_

Email \_\_\_\_\_

**1 What prompted you to seek estate planning services?**

- |   |  |
|---|--|
| <input type="checkbox"/> First-time estate planning                       | <input type="checkbox"/> Update existing documents |
| <input type="checkbox"/> Life change (marriage, divorce, new child, etc.) | <input type="checkbox"/> Specific concern or issue |
| <input type="checkbox"/> Other _____                                      |  |

**2 Which of the following documents do you have in place?**

- |  |   |
|--|---|
| <input type="checkbox"/> Will without Testamentary Trust | <input type="checkbox"/> Will with Testamentary Trust |
| <input type="checkbox"/> Power of Attorney               | <input type="checkbox"/> Living Trust                 |
| <input type="checkbox"/> None of the above               |   |

**3 What is your marital status?**

- |                                   |   |
|-----------------------------------|---|
| <input type="checkbox"/> Single   | <input type="checkbox"/> Widowed                              |
| <input type="checkbox"/> Married  | <input type="checkbox"/> Long-term relationship but unmarried |
| <input type="checkbox"/> Divorced |   |

**4 How many children under the age of 18 do you have?** \_\_\_\_\_

**5 How many adult children do you have?** \_\_\_\_\_

**6 If you have any adult children, how many are under the age of 24?** \_\_\_\_\_

**7 Are you concerned about federal estate tax? The federal estate tax exemption for 2025 is \$13.99 million per individual and will increase to \$15 million for 2026.**

- ☐ Yes    ☐ No    ☐ Unsure - need more information

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**8 What are your main planning priorities? (Check all that apply)**

- |  |   |
|--|---|
| <input type="checkbox"/> Care of my minor children if something happens to both parents                | <input type="checkbox"/> Reducing court delays and costs after my passing                       |
| <input type="checkbox"/> Responsible management of inheritance for minor children                      | <input type="checkbox"/> Reducing family disputes over inheritance                              |
| <input type="checkbox"/> Planning for my own aging and potential for someone else to manage my affairs | <input type="checkbox"/> Minimizing federal estate taxes or addressing other financial concerns |
| <input type="checkbox"/> Charitable giving strategies  | <input type="checkbox"/> Other _____  |

**9 Which documents do you think you might need? (Check all that apply)**

- |  |   |
|--|---|
| <input type="checkbox"/> Will without Testamentary Trust | <input type="checkbox"/> Will with Testamentary Trust |
| <input type="checkbox"/> Power of Attorney               | <input type="checkbox"/> Living Trust                 |
| <input type="checkbox"/> Not sure - need guidance        |   |

**10 Please share anything else you feel is relevant for the consultation meeting.**

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FOUR MUST KNOW

# Estate Planning Terms

LOUISIANA LAW

## 1 WILL

### When does it apply?

A legal document that directs how your assets will be distributed after your death and names guardians for minor children

Only after your death

## 2 POWER OF ATTORNEY

### When does it apply?

A legal document that gives another person authority to act on your behalf while you are alive for financial, health, and/or other legal matters

Immediately upon signing (unless specified otherwise) and stops upon your death

## 3 TESTAMENTARY TRUST

### When does it apply?

A legal arrangement created by your will that holds and manages assets for beneficiaries according to specific instructions

Only after your death

## 4 LIVING TRUST

### When does it apply?

A legal arrangement you create and fund during your lifetime which holds legal title to your assets and manages them according to specific instructions

Immediately upon creation and funding and can continue to apply after your death