DAYTON & KAIKIS, PC

ESTATE PLANNING QUESTIONNAIRE

Please fill out all applicable sections.

General Information				
Legal Name:				
Fir	est	Middle		Last
Date of Birth:(M	// M/DD/YYYY)			
Address:				
Str	reet	City	State	Zip
Employer/Occupation: _				
Contact Information				
Telephone: Home	Work	Cell		dicate the best each you:
E-mail:				
Spousal Information *If applicable please attach ar	ny prenuptial or po	ostnuptial agreement	s in place for this ma	arriage.
Married? Yes / No	Date of M	Iarriage	_// MM/DD/YYYY)	
Spouse's legal name:		Middle		Last
Spouse's date of birth: _	// (MM/DD/)	/ YYYY)		
Spouse's contact informa	ation:	Phone	_/Em	ail
Employer/Occupation: _				

Familial Information

Children:				
CHILD 1-				
Legal name:				
	First	Middle		La
Date of birth:	//			
	(MM/DD/YYYY)			
Address:				
Street		City	State	Zi
Marital Status and a	name (if applicable):			
Children, if yes please li	st:			
CHILD 2- Legal name:				
	First	Middle		La
Date of birth:	// (MM/DD/YYYY)			
Address:				
Street		City	State	Zi
Marital Status and 1	name (if applicable):			
	st:			
CHILD 3-				
Legal name:	First	Middle		La
Date of birth:	// (MM/DD/YYYY)			
Address:				
Street	<u></u>	City	State	Zi

Minor Children:			
CHILD 1- Legal name:	First	Middle	Last
Date of birth:	// (MM/DD/YYYY)		Last
CHILD 2- Legal name:			
Date of birth:	First / / / (MM/DD/YYYY)	Middle	Last
CHILD 3- Legal name:	E'	Milli	
Date of birth:	First //	Middle 	Last
If applicable, please indica	ate any child with an in	firmity, disability or spe	cial need.
If applicable, please list th	ne name of any minor ch	nild's parent if differs from	om spouse.
If applicable, please list an	ny issues in regards to c	ustody.	
Other Important Persons:			
Legal name:	First	Middle	Last
Relationship:			
Legal name:	First	Middle	Last
	1100		Lust

Relationship:

I. LAST WILL AND TESTAMENT

Legal name:	First	Middle		Last
Address:				
110010881	Street	City	State	Zip
Relationship:	·			
ease indicate the pr	roposed contingent Ex	ecutor/Executrix for	r your Will:	
Legal name:				
C	First	Middle		Last
Address:				
	Street	City	State	Zip
Relationship:				
	or will ensure that inl ry out your wishes.		l ultimately m paid on your	
their best to carı	or will ensure that inl	neritance taxes are		
ease indicate the pr	or will ensure that inlary out your wishes. roposed Guardian(s) fo	heritance taxes are		estate, a
ease indicate the pr	or will ensure that inlary out your wishes. roposed Guardian(s) for	heritance taxes are		estate, a
ease indicate the pr	or will ensure that inl ry out your wishes. roposed Guardian(s) fo	neritance taxes are or Minor Children: Middle	paid on your	estate, a
ease indicate the property Legal name:	or will ensure that inlary out your wishes. roposed Guardian(s) for First Street	or Minor Children: Middle City	s paid on your	estate, a
ease indicate the property Legal name:	or will ensure that inl ry out your wishes. roposed Guardian(s) fo	or Minor Children: Middle City	s paid on your	estate, a
ease indicate the property Legal name: Address: Relationship:	or will ensure that inlary out your wishes. roposed Guardian(s) for First Street	or Minor Children: Middle City	s paid on your	estate, a
ease indicate the process and	roposed Guardian(s) for First Street Contingent Guardian(s)	or Minor Children: Middle City for Minor Children	s paid on your	Last Zip
ease indicate the process and	roposed Guardian(s) for First Street Contingent Guardian(s)	or Minor Children: Middle City for Minor Children	s paid on your	estate, a
ease indicate the process and	roposed Guardian(s) for First Street Contingent Guardian(s)	or Minor Children: Middle City for Minor Children Middle	s paid on your	Last Zip

<u>Guardian for Minor Children</u>: The Guardian(s) you choose to be the person (or persons) who provides protective supervision over your children is obviously one of the most important decisions you will have to make. A Guardian will not only be responsible for your children, but will also be able to pull money from the Trust you set up (with the permission of the Trustee) in order to pay for education, the cost of living, and other expenses for your children.

Legal name:				
-	First	Middle		Last
Address:				
	Street	City	State	Zip
Relationship	:			
Please indicate the p Children:	proposed Contingent Tr	rustee(s) for manage	ement of funds	for Minor
Legal name:				
_	First	Middle		Last
Address:				
	Street	City	State	Zip
Relationship	:			
Testamentary Trus death. Often used fo	st: A Testamentary Truer minor children, this to pending on your child'	ust is a trust that doe ype of trust can be s		•
Testamentary Trustee for Minor for your minor child accordance with you	st: A Testamentary Tru or minor children, this t	ust is a trust that doe ype of trust can be s s age. vill make certain tha pose, as well as distant un be one or two pers	et up to "pay o t any money h ributed to your	out" at any eld in trust children in
Testamentary Trustee for Minor for your minor child accordance with you choose to use a bank.	st: A Testamentary Truster minor children, this topending on your child' Children: A Trustee where is kept for that purar wishes. A Trustee can	ast is a trust that doe ype of trust can be s s age. will make certain tha pose, as well as distant to be one or two pers	et up to "pay on t any money h ributed to your sons you trust,	out" at any eld in trust children in or you may
Testamentary Trustee for Minor for your minor child accordance with you choose to use a bank Please indicate the darise: 1 Ou	st: A Testamentary Truster minor children, this to pending on your child' Children: A Trustee was the result of the purple of t	ast is a trust that doe ype of trust can be so age. vill make certain that pose, as well as districted by the one or two personser. in the event a Testal immediately.	et up to "pay on t any money h ributed to your sons you trust, amentary Trust	eld in trust children in or you may

Have you previously executed a Will, if yes, where is the Will currently located?
Please list any special provisions for pets.
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Please list any funeral arrangement specifics that have already been made, or any such special requests.
Please list any specific estate planning objectives, concerns, or requests that you would like to discuss and/or address in your Will.

II. POWER OF ATTORNEY AND LIVING WILL

Please indicate the pr	roposed Agent(s) for	your Power of Attorne	ey:	
Legal name: _	First	Middle		Last
Address:	Street	City	State	Zip
Relationship:				
Please indicate the pr	oposed contingent A	gent(s) for you Power	of Attorney:	
Legal name: _	First	Middle		Last
Address:				
	Street	City	State	Zip
Relationship:				
opportunity to auth Attorney) to make le yourself.	orize an "agent" (us egal decisions for yo	nat allows you (the "pount of the pount of t	y member, fi onger able to	riend, or do so for
Have you previously currently located?	executed a Power of	Attorney, if yes, when	e is that docu	ıment

III. LIVING WILL

Please indicate the pr	roposed Surrogate(s) f	for your Living Will:		
Legal name:	First	Middle		Last
Address:	Street	City	State	Zip
Relationship:		•		<u>.</u>
Please indicate the pr	roposed contingent Su	rrogate(s) for your L	iving Will:	
Legal name:	First	Middle		Last
Address:	Street	City	State	Zip
Relationship:		•		
	l document that voice If as a result of medic	•	isions if you a	re unable
Have you previously located?	executed a Living Wi	ill, if yes, where is th	at document c	urrently

IV. ASSET AND INSURANCE INFORMATION

Please list all real estate owned including how title is held (i.e. tenants by the entirety, tenants in common or own with siblings, wife, etc.)
Please list all life and/or long term care insurance policies, including term, amount and beneficiary information
Please list all Pensions, IRAs, Annuities and/or Work Connected Benefits
Please indicate if you are interested in obtaining information regarding either Life or

Please indicate if you are interested in obtaining information regarding either Life or Long-Term Care insurance. Yes / No

<u>Life Insurance</u> Insurance that guarantees a specific sum of money to your designated beneficiary upon your death or to yourself if you live beyond a certain age.

<u>Long- Term Care Insurance</u> Insurance that can provide benefits to help pay for care you may need in the future.

TERMS and DEFINITIONS

TESTAMENTARY TRUST: A Testamentary Trust is a trust that does not take effect until your death. Often used for minor children, this type of trust can be set up to "pay out" at any time, or in stages depending on your child's age.

EXECUTOR: A person named in your will who will ultimately manage your estate. Your executor will ensure that inheritance taxes are paid on your estate, and do their best to carry out your wishes.

TRUSTEE for MINOR CHILDREN: A Trustee will make certain that any money held in trust for your minor children is kept for that purpose, as well as distributed to your children in accordance with your wishes. A Trustee can be one or two persons you trust, or you may choose to use a bank or your financial adviser.

GUARDIAN for MINOR CHILDREN: The Guardian(s) you choose to be the person (or persons) who provides protective supervision over your children is obviously one of the most important decisions you will have to make. A Guardian will not only be responsible for your children, but will also be able to pull money from the Trust you set up (with the permission of the Trustee) in order to pay for education, the cost of living, and other expenses for your children.

POWER of ATTORNEY: A legal document that allows you (the "principal") an opportunity to authorize an "agent" (usually a trusted family member, friend, or Attorney) to make legal decisions for you when you are no longer able to do so for yourself.

LIVING WILL: A legal document that voices your medical decisions if you are unable to speak for yourself as a result of medical incapacity.

LONG-TERM CARE INSURANCE: Insurance that can provide thousands of dollars in benefits to help pay for care you may need in the future.

LIFE INSURANCE: Insurance that guarantees a specific sum of money to your designated beneficiary upon your death or to yourself if you live beyond a certain age.