

# Law Office of Kimberly A. Gossett, PA

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## ESTATE PLANNING QUESTIONNAIRE FOR INDIVIDUALS

Date: \_\_\_\_\_

Full Name: \_\_\_\_\_

Place of Birth: \_\_\_\_\_ U.S. Citizen Y N

Other Names known by: \_\_\_\_\_

### 1. Home Address:

Street Address/P.O. Box \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home Telephone No.: \_\_\_\_\_ Cell: \_\_\_\_\_

Email address: \_\_\_\_\_

### 2. Names of children, whether natural or adopted:

A. \_\_\_\_\_ Phone No \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name of Child's Spouse (if any) \_\_\_\_\_

Address: \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

B. \_\_\_\_\_ Phone No \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name of Child's Spouse (if any) \_\_\_\_\_

Address: \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

C. \_\_\_\_\_ Phone No \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name of Child's Spouse (if any) \_\_\_\_\_

Address: \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

D. \_\_\_\_\_ Phone No \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name of Child's Spouse (if any) \_\_\_\_\_

Address: \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

Grandchild: \_\_\_\_\_ Date of Birth \_\_\_\_\_

3. Do you have any other relatives dependent upon you for support? Y N  
(If yes, give names and relationships): \_\_\_\_\_

4. Names and addresses of others or alternate persons to receive property: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

5. Please list any specific items or amounts that you wish to give to any  
Individuals or organizations:

NAME

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6. All other tangible personal property (automobiles, clothing, furniture, pictures,  
To be distributed to: (check one)

- Children equally
- Other (specify): \_\_\_\_\_

7. Do you have a present will:  Y  N (if yes, attach a copy)

8. Have you ever created a trust?  Y  N

If yes, attach a copy and list approximate value: \$ \_\_\_\_\_

9. Have you ever received a substantial amount by inheritance?  Y  N

If yes, when? \_\_\_\_\_ Approximate amount \$ \_\_\_\_\_

10. Who will serve as your personal representative?  
(indicate relationship to you)

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Alternate (if above person(s) are unable to serve.)

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11. Your choice to act as guardian of your minor children (if applicable):

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City and State of residence: \_\_\_\_\_

Alternate(s): \_\_\_\_\_

City and State of residence: \_\_\_\_\_

12. Do you have a safety deposit box?  Y  N  
If yes, where is it located

Name(s) deposit box is listed under: \_\_\_\_\_

13. Are you concerned that one or more of your children or grandchildren will not behave responsibly with money that you give them?  Y  N
14. Are any of your children or grandchildren attending private school, College, or graduate school?  Y  N
15. Do you have any relative who regularly incurs significant medical Bills; or receiving public assistance such as SSI or Medicaid?  Y  N
16. Do you wish to be cremated?  Y  N
17. Do you want to be an organ donor?  Y  N

## LIST OF ASSETS

DESCRIPTION OF ASSET	Approximate Value	Is this asset jointly owned with someone else? If so, with whom?
<b>REAL ESTATE</b> Your Residence location  Outstanding mortgage amount:		
<b>OTHER REAL ESTATE</b> Location(s)  Outstanding mortgage(s) amount:		
<b>AUTOMOBILES</b> Year / make / model  Outstanding loan amount, if any:		
<b>BOAT(S)</b> Description  Outstanding loan amount, if any:		
<b>COLLECTIBLES of value sentimental or financial</b>  ART – please describe  JEWELRY: please describe  OTHER:		

<p><b>BANK ACCOUNTS</b>  Identify bank and type of account  (checking / savings / money market)</p>		
<p><b>CERTIFICATE OF DEPOSITS</b>  Identify Bank / Amount / maturity date</p>		
<p><b>STOCK / MUTUAL FUNDS / BONDS</b>  Specify number of shares  Do you have actual shares or bonds or are they held in a  brokerage account?  If so, identify brokerage accounts:</p>		
<p><b>BUSINESS ENTITIES</b>  (Partnerships / S Corporations / LLC, etc)</p>		
<p><b>MORTGAGES OR NOTES ON DEBTS</b>  (money owed to you by someone else)</p>		

<p><b>RETIREMENT ACCOUNTS</b> Identify primary and contingent beneficiaries</p>		
<p><b>ANNUITIES</b> Identify primary and contingent beneficiaries</p>		
<p><b>LIFE INSURANCE POLICIES</b> For each one, please identify the insured, the primary and contingent beneficiaries and the payout amount (face value).</p>		