

CLIENT CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

Please fill out completely and E-mail to Kathleen@forrestlawoffice.com or mail to **410 S. Orchard St. Suite 120, Boise, ID 83705**. All sections and information must be filled out prior to the office conference. Please be sure to check all appropriate boxes. If "NONE", please state "NONE". If "NOT APPLICABLE", please state "N/A". PLEASE PRINT CLEARLY

1. Your Full Name:

2. IF MARRIED OR SEPARATED, complete (a) below:

(a) Spouse's Full Name:

3. Your Street Address: _____

City _____ State _____ Zip Code _____

4. Telephone Numbers:

Cell: _____

Day: _____/Night: _____

5. E-mail address: _____

6. Referred By: _____ 7. Today's Date _____

If referred by a person, is this a client or attorney?

Do you want a Living Will telling hospitals and doctors not to prolong your life by artificial means? Yes _____ No _____

Do you want a Durable Power of Attorney in the event of your physical or mental disability to help you with financial affairs? Yes _____ No _____

How can we help you? What are your questions/other important info?

8. Your Sex: Male Female

9. Your Marital Status: Single Married Separated Divorced Widowed

10. Your Date of Birth: _____ SS # _____

11. Spouse Date of Birth: _____ SS # _____

12. Do you have a Prenuptial Agreement in effect? Yes/No, If so, dated:
_____]

13. Have either one of you been previously married? If yes, please provide the name of former spouse(s) and dates of marriage/divorce.

14. Siblings (living and deceased):

15. Children (children of former marriages are listed in #18)

16. Are any of your children adopted? If so, state the name and date of birth

17. Please name a guardian and an alternate to care for your minor children. Include addresses and phone numbers.

Guardian: _____

Address:

Phone: _____ Cell: _____

Alternate Guardian: _____

Address:

Phone: _____ Cell: _____

18. Children of former marriage/relationships:

PERSONAL REPRESENTATIVE - The person charged with administering/Probating your estate, paying taxes and/or other debts, preserving, managing, and distributing estate assets and property is called a personal representative (PR). This person should be one in whom you have trust and confidence. Typically, your SPOUSE is usually named as primary PR, followed by the child who lives closest to you. Please provide the following information about the person you wish to name to serve in this capacity.

1. PRIMARY Choice of Personal Representative:

Name: _____

Relationship: _____ Address: _____

2. SECOND Choice of Personal Representative: This individual will serve in the event that the primary personal representative is not alive at the time of your death, or is unable to serve.

Name: _____

Relationship: _____ Address: _____

ASSET INFORMATION- Must Be Completed - If none, write NONE.

House/Real Estate Address:

1. _____

Estimate of Total Real Estate Value: _____

Approximate mortgage: _____

2. _____

Estimate of Total Real Estate Value: _____

Approximate mortgage: _____

Bank Accounts, Stocks, CDs and Assets (please use additional sheets if necessary):

Account

Value

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Beneficiaries of Accounts (if none write "none")

Account

Beneficiary

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Other Major Assets (if none, write "none"):

Approximate Amount of Life Insurance: _____
Beneficiary: _____

Do you have rights arising out of military service? VA benefits?

In the Will- Who do you want to get your assets:

Beneficiary (1) _____ Relationship _____

Beneficiary (2) _____ Relationship _____

Beneficiary (3) _____ Relationship _____

Beneficiary (4) _____ Relationship _____

Any Charitable Bequests of Money and Property:

1. Name: _____
Amount/Item: _____
Address: _____

2. Name: _____
Amount/Item: _____
Address: _____

Any Specific Bequests of Money and Property:

1. Name: _____
Amount/Item: _____
Address: _____

2. Name: _____
Amount/Item: _____
Address: _____

3. Name: _____
Amount/Item: _____
Address: _____

A. MARRIED PERSONS WITH CHILD(REN) OR GRANDCHILD(REN).

Generally most married people provide that, upon their death, property will be distributed as follows:

1. Your estate (all property and assets not owned jointly with another person) will be distributed to your surviving spouse.
2. If your spouse predeceases you, then your estate will be divided in equal shares among all of your living children, If any child shall predecease you, then that child's share to their children (grandchildren).

Names of Children: _____ Age: _____
_____ Age: _____
_____ Age: _____
_____ Age: _____

LIST THE NAMES AND AGES OF ALL CHILDREN EVEN IF THEY ARE OLDER THAN EIGHTEEN. IF NO CHILDREN, WRITE NONE.

III. GUARDIAN(S) OF MINOR CHILD(REN) [*Skip this section if you have NO minor children and DO NOT want a trust. There are substantial additional fees for preparation of a Trust*]

The surviving parent of a minor child is ordinarily entitled to be the GUARDIAN of that child. In the case of simultaneous death of you and your spouse, or if you are a single parent, you should appoint a Guardian for your minor child. It is advisable, prior to the completion of this Questionnaire, to make sure that your proposed Guardian(s) is (are) willing to serve as Guardian(s). In addition, the Guardian will also hold the monies for the minor children UNLESS you direct us otherwise. In your Will you can have any adult serve as Trustee of monies for

minor children. Provide the following information about the person(s) you select to be Guardian(s)/Trustee(s). In the event my spouse predeceases me, I name as GUARDIAN(S)/ TRUSTEE(S):

1. PRIMARY Choice of GUARDIAN / TRUSTEE:

Full Name: _____

Relationship: _____

Address: _____

2. SECOND Choice of GUARDIAN / TRUSTEE:

Full Name: _____

Relationship: _____

Address: _____

Are there any beneficiaries with special needs, or receiving SSI or SSD? Please answer in detail:

Do any of your children have special education, medical, or physical needs?

Do you provide primary or other major financial support to adult children?

B. **MARRIED PERSONS WITH NO CHILD(REN) OR GRANDCHILD(REN).**

Generally most married people with no child(ren) or grandchild(ren) provide that upon their death their property will be distributed as follows:

1. Your estate (all property and assets not owned jointly with another person) will be distributed to your surviving spouse, but
2. If your spouse predeceases you, then your estate will be distributed to your living parent, or equally to your living parents.
3. But should both of your parents predecease you, then your estate will distributed equally to your brothers and sisters or equally to the children of a

predeceased brother or sister. Please check B above only if you wish your property distributed precisely and exactly as indicated in section B, 1 through 3, above.

[] C. DIVORCED OR WIDOWED PERSONS WITH CHILD(REN) OR GRANDCHILD(REN).

Generally, most divorced or widowed persons with child(ren) or grandchild(ren) provide that upon their death property will be distributed as follows:

1. Your estate (all property and assets not owned jointly with another person) will be distributed in equal shares to all of your living child(ren).
2. But if one or more of your children predeceases you, that deceased child's share will be distributed to his or her child(ren), your grandchild(ren) in equal shares

Durable Power of Attorney for Management of Assets

This document allows you to name a person to handle your financial affairs and manage your assets if and when you are incompetent. This is NOT effective after death. It is only used during the period of incompetency. Married couples usually name their spouses as the primary attorney-in-fact and name an alternative in the event that the spouse is unable to serve.

1. Attorney-in-Fact

- a. Name _____
- b. Relationship _____
- c. Address _____

2. Alternate Attorney-in-Fact

- a. Name _____
- b. Relationship _____
- c. Address _____

Healthcare Directive (Living Will) and Durable Power of Attorney for Healthcare

This document allows you to name a person to make healthcare decisions on your behalf if and when you are incompetent. This is NOT effective after death. It is only used during the period of incompetency. Married couples usually name

their spouses as the primary attorney-in-fact and name an alternative in the event that the spouse is unable to serve.

1. Agent (Attorney-in-Fact)

- a. Name _____
- b. Relationship _____
- c. Address _____
- d. Home Phone _____

2. Alternate Agent

- a. Name _____
- b. Relationship _____
- c. Address _____
- d. Home Phone _____

Do you want specific funeral arrangements?

Client

Signature

Client

Signature