

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

Buhrman Law Firm, P.C.
345 Frazier Avenue, Suite 210
Chattanooga, TN 37405
Phone: (423) 266-5691 Fax: (423) 265-7041
www.buhrmanlaw.com
jrb@buhrmanlaw.com; sking@buhrmanlaw.com

I. FAMILY DATA (Please list your name as you wish to have on legal documents) DATE: _____

NAME: _____ D.O.B. _____ S.S. # _____

PHONE AND EMAIL: _____

ADDRESS: _____

CHILDREN (Include ages): _____

II. ESTATE PLANNING GOALS: Please describe your overall estate planning goals:

III. ASSET SUMMARY: Please use Fair Market Value and round to nearest \$1000.

Real Estate (Residence) _____

Real Estate (Other) _____

Cash, Bank Accounts, CDs,
etc. _____

Stocks, Bonds, Mutual
Funds, Brokerage Accts. _____

Household goods, Personal
Effects & Misc. _____

Tax Deferred Annuities, 401(k) Plans, IRAs and Other Retirement Accounts

<u>Description</u>	<u>Value</u>	<u>Primary Beneficiary</u>	<u>Contingent Beneficiary</u>
_____	_____	_____	_____
_____	_____	_____	_____

LIFE INSURANCE ON LIFE OF CLIENT

<u>Policy Owner</u>	<u>Type</u>	<u>Value</u>	<u>Beneficiary</u>
_____	_____	_____	_____
_____	_____	_____	_____

IV. APPOINTMENT OF AGENTS FOR:

	<u>FINANCIAL POWER OF ATTORNEY</u>		<u>HEALTH CARE POWER OF ATTORNEY</u>	
Choice:	<u>Name</u>	<u>Relationship</u>	<u>Name</u>	<u>Relationship</u>
#1	_____	_____	_____	_____
#2	_____	_____	_____	_____

V. APPOINTMENT OF EXECUTOR. Whom do you want to be in charge of administration of your estate?

Choice	<u>Name</u>	<u>Relationship</u>	<u>Address</u>
#1	_____	_____	_____
#2	_____	_____	_____

VI. APPOINTMENT OF TRUSTEE. If your will creates a trust for others, who do you want to manage this inheritance? This can be the same person as your Executor. Trustee choices should be same for both husband and wife.

Choice	<u>Name</u>	<u>Relationship</u>	<u>Address</u>
#1	_____	_____	_____
#2	_____	_____	_____

VII. APPOINTMENT OF GUARDIAN. Whom do you want to raise your children if you die with minor children?

Choice	<u>Name</u>	<u>Relationship</u>	<u>Address</u>
#1	_____	_____	_____
#2	_____	_____	_____

VIII. BENEFICIARIES OF SPECIAL GIFTS. Do you want to make a gift—cash or a specific item to a charity, foundation or a religious foundation? Do you want to give any specific items to a family member or other individual?

<u>Name of Beneficiary</u>	<u>Charitable Amount</u>	<u>Specific Gift</u>
_____	_____	_____
_____	_____	_____

VIII. RESIDUARY AND CONTINGENT BENEFICIARIES. Whom do you want to receive the rest of your estate after these special gifts have been distributed? Whom do you want to receive your estate if you and your spouse outlive the people you have named to be the residuary beneficiaries?

<u>Name of Beneficiary</u>	<u>Amount or Percentage</u>	<u>Contingent Beneficiary</u>	<u>Amount or Percentage</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____