

Drop Off Date: _____ Appt. Date: _____

Ref. Source:

St. Louis Estate Planning - Estate Plan Review Intake Questionnaire

Please complete this short questionnaire when dropping off your estate planning documents. Your answers help our attorneys review your plan efficiently and accurately.

SECTION 1 — Contact Information

Name:

Best Phone Number:

Email:

SECTION 2 — Family Overview

Marital Status (Single / Married / Partnered / Widowed / Divorced / Remarried)

Spouse/Partner's Full Legal Name (if applicable):

Children's Names & Ages:

Any children or family members with special needs or addictions? (Yes/No — If Yes, explain):

Any blended family considerations (a family consisting of a couple and their children from this and all previous relationships) to your estate plan? (Yes/No — If Yes, explain):

Are any of your children married to, or co-parenting with, individuals who have children from prior relationships? You may wish to consider whether or not to include these individuals in your estate plan.

SECTION 3 — Changes Since Your Documents Were Signed

Has anyone named in your documents passed away? (Yes/No — If Yes, list who):

Any marriages, divorces, or major relationship changes? (Yes/No — If Yes, describe):

Any new children or grandchildren? (Yes/No):

Were your kids minors when documents were established? (Yes/No):

Did you buy or sell any real estate since your plan was last updated? (Yes/No):

SECTION 4 — Trust & Asset Funding

Do you currently have a Trust? (Yes/No/Not Sure):

If yes, do you believe your Trust is properly funded? (Yes/No/Not Sure):

List any major changes in assets since your estate planning documents were signed: (home, accounts, income, inheritance, insurance, business, etc.):

Do any accounts or insurance policies have outdated beneficiary designations? (Yes/No/Not Sure):

SECTION 5 — Concerns & Goals

What are your top concerns regarding your estate plan?

Anything special you want your estate plan to accomplish? (probate avoidance, simplicity, protection for kids, long-term care, tax planning, change terms of distribution, etc.):

Anything specific you want the attorney to focus on during the review?

Thank you for completing this form. Please call 314-858-9799 before dropping off documents to confirm someone is available to greet you. Kindly note that we cannot meet with you at drop-off. Thank you for your understanding. - St. Louis Estate Planning – 2705 Dougherty Ferry Rd. Ste 200, St. Louis, MO 63122