Ivan & Daugustinis
ESTATE AND TAX ATTORNEYS

Michael J. Ivan, Jr. +^
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Board Certified in Taxation +
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Of Counsel *

CONFIDENTIAL

Today's Date: _____

ESTATE PLANNING QUESTIONNAIRE
Married

	Full Legal Name (first, middle, last)	**Nickname**	**DOB**
Husband:			
Wife:			

RESIDENCE ADDRESS

Street			
City	State	Zip	County

CONTACT INFORMATION

	Husband	**Wife**
Home Phone:		
Cell Phone:		
Office Phone:		
Email:		
Correspondence Preference:	☐ Email ☐ U.S. Mail	☐ Email ☐ U.S. Mail

FAMILY - CHILDREN

	Full Legal Name (first, middle, last)	**Nickname**	**DOB**	**Gender**
☐ H ☐ W ☐ J				
☐ H ☐ W ☐ J				
☐ H ☐ W ☐ J				
☐ H ☐ W ☐ J				
☐ H ☐ W ☐ J				
H=Husband W=Wife J=Joint				

Are you a U.S. Citizen? Husband: ☐ Yes ☐ No
Wife: ☐ Yes ☐ No

Do you have a premarital agreement? ☐ Yes ☐ No

While married, have you ever lived in Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington or Wisconsin? ☐ Yes ☐ No

Have either or both of you ever filed a federal gift tax return? ☐ Yes ☐ No

Do you have old estate planning documents? ☐ Yes ☐ No

Are you expecting a substantial inheritance in the future? ☐ Yes ☐ No

Are you currently the beneficiary of a trust established by another? ☐ Yes ☐ No

Do you have Umbrella Insurance? ☐ Yes ☐ No

Accountant (name and contact): _____

Financial Advisor (name and contact): _____

Who referred you to Ivan & Daugustinis, PLLC? _____

LIFE INSURANCE

	Type	Company	CSV	Loans	Premium	Face Value
☐ H ☐ W						
☐ H ☐ W						
☐ H ☐ W						
☐ H ☐ W						
					TOTAL:	

RETIREMENT ACCOUNTS

	Company/Broker	Type	Amount
☐ H ☐ W			
☐ H ☐ W			
☐ H ☐ W			
☐ H ☐ W			
		TOTAL:	

INVESTMENTS
(STOCKS, BONDS, MUTUAL FUNDS, ETC. SEPARATE FROM RETIREMENT ACCOUNTS)

	Description	Company/Broker	Amount
☐ H ☐ W ☐ J			
☐ H ☐ W ☐ J			
☐ H ☐ W ☐ J			
☐ H ☐ W ☐ J			
		TOTAL:	

REAL ESTATE

	Description/Address	FMV	Mortgage
☐ H ☐ W ☐ J			
☐ H ☐ W ☐ J			
☐ H ☐ W ☐ J			
☐ H ☐ W ☐ J			
		TOTALS:	

BUSINESSES/BUSINESS INTERESTS

	Description	Value
☐ H ☐ W ☐ J		
☐ H ☐ W ☐ J		
☐ H ☐ W ☐ J		
☐ H ☐ W ☐ J		
	TOTAL:	

CASH / OTHER
(AUTO, BOAT, RV, MOTORCYCLE, ATV, ART, ANTIQUES, JEWELRY, COLLECTABLES)

	Description	Amount
☐ H ☐ W ☐ J		
☐ H ☐ W ☐ J		
☐ H ☐ W ☐ J		
☐ H ☐ W ☐ J		
	TOTAL:	

FINANCIAL SUMMARY

Husband	Wife	Joint	Grand Total
$	$	$	$

The information provided above will be relied upon by Ivan & Daugustinis, PLLC in designing an estate plan that meets your goals, and it will be kept strictly confidential. Unless you have specifically directed us to do so, we will not undertake to independently verify the above information, though we reserve the right to do so. By your signature below, you acknowledge that the information provided above is a complete and reasonably accurate list of all your assets and property interests, to the best of your knowledge, as of the date indicated below.

_____   _____
Husband's Signature   Wife's Signature

Dated: _____   Dated: _____

Last four digits of Social   Last four digits of Social
Security Number: _____   Security Number: _____

SURROGATE DESIGNATIONS

1.   Who would you like to be your primary decision maker for financial matters?

	Full Legal Name (first, middle, last)	**Relationship**	**Address**	**Telephone**
Husband:				**Home:**
				Cell:
Wife:				**Home:**
				Cell:

2.   Who would you like to be your alternate decision maker(s) for financial matters?

	Full Legal Name (first, middle, last)	**Relationship**	**Address**	**Telephone**
Husband:				**Home:**
				Cell:
Wife:				**Home:**
				Cell:

3.   Who would you like to be your primary decision maker for health decisions?

	Full Legal Name (first, middle, last)	**Relationship**	**Address**	**Telephone**
Husband:				**Home:** **Cell:**
Wife:				**Home:** **Cell:**

4.   Who would you like to be your alternate decision maker(s) for health decisions?

	Full Legal Name (first, middle, last)	**Relationship**	**Address**	**Telephone**
Husband:				**Home:** **Cell:**
Wife:				**Home:** **Cell:**

5.   Who would you like to serve as guardian should the need arise?

Choice 1

	Full Legal Name (first, middle, last)	**Relationship**	**Address**	**Telephone**
Husband:				**Home:**
				Cell:
Wife:				**Home:**
				Cell:

Choice 2

	Full Legal Name (first, middle, last)	**Relationship**	**Address**	**Telephone**
Husband:				**Home:**
				Cell:
Wife:				**Home:**
				Cell: