

CONFIDENTIAL ESTATE PLANNING

QUESTIONNAIRE FOR

Date

_____ Trust Package (Individual)

_____ Last Will & Testament Package (Individual)

I / We have reviewed the information contained in this confidential estate planning questionnaire. I / We hereby declare that all information is correct and accurate to the best of my / our knowledge.

Client Signature

Client Signature

ESTATE PLANNING QUESTIONNAIRE

Personal Information

Last Will & Testament

Trust

Client Name _____ **DOB** _____

Address _____

County of Residence _____

Home Phone _____ **Work** _____ **Cell** _____

Email Address _____

Marital Status: Single Married **DOM** _____ Widowed Divorced

Spouse Name _____ **DOB** _____

Please list below the beneficiary's name, sex (M/F) and whether the child is the husband's (H), wife's (W) or Both (B). Also list what percentage of the client's estate that the beneficiary will receive.

<u>Children / Beneficiaries Full Names</u>	<u>Age</u>	<u>Sex</u>	<u>HWB</u>	<u>Percent</u>
_____	_____	_____	_____	_____ %
_____	_____	_____	_____	_____ %
_____	_____	_____	_____	_____ %
_____	_____	_____	_____	_____ %
_____	_____	_____	_____	_____ %
_____	_____	_____	_____	_____ %

Distribute client's estate as follows:

Distribute Outright Hold in Trust until _____ years of age.

If a beneficiary predeceases the client, his or her share is to be:

Distributed equally among his or her children, if any.

Distributed equally to the remaining surviving beneficiaries named above.

Trust-Successor Trustee

(The individual or individuals that handle the administration of your Trust Assets/Estate upon death or incapacitation.)

Primary Successor Trustee (Name, City/State) _____

Alternate Successor Trustee (Name, City/State) _____

Last Will & Testament / Pour-Over Will - Personal Representative (aka Executor)

(The individual or individuals named to handle your estate through the Probate process.)

Male

Same as Successor Trustees (or)

Primary PR (Name, City/State) _____

First Alternate PR (Name, City/State) _____

Female

Same as Successor Trustees (or)

Primary PR (Name, City/State) _____

First Alternate PR (Name, City/State) _____

Guardians for Minor Children

(The individual or individuals who will take care of your minor children upon your passing.)

Same as Successor Trustees (or)

Primary Guardian (Name, City/State) _____

First Alternate Guardian (Name, City/State) _____

General Durable Financial Power of Attorney - Personal Representative / Agent

(The individual who will make Financial/Legal decisions for you, if you cannot make them for yourself).

Male

Same as Successor Trustees (or)

Primary PR (Name, City/State) _____

First Alternate PR (Name, City/State) _____

Female

Same as Successor Trustees (or)

Primary PR (Name, City/State) _____

First Alternate PR (Name, City/State) _____

Medical Power of Attorney / Living Will – Personal Representative

(The individual who will make medical decisions for you, if you cannot make them for yourself. The Living Will is your wishes on life support if you have a terminal illness and there is no chance of recovery.)

Male

Same as Successor Trustees (or)

Primary PR (Name, City/State) _____

First Alternate PR (Name, City/State) _____

Female

Same as Successor Trustees (or)

Primary PR (Name, City/State) _____

First Alternate PR (Name, City/State) _____

Estate Valuation Worksheet

<u>Asset</u>	<u>Approx. Value</u>	<u>Notes</u>
Home	\$ _____	_____
Contents of Home	\$ _____	_____
Other Real Property	\$ _____	_____
Other Real Property	\$ _____	_____
Motor Home / RV	\$ _____	_____
Auto / Boat	\$ _____	_____
Auto / Boat	\$ _____	_____
Collections	\$ _____	_____
Special Jewelry	\$ _____	_____
Antiques	\$ _____	_____
Art	\$ _____	_____
Annuities	\$ _____	_____
Life Insurance (DB)	\$ _____	_____
Life Insurance (DB)	\$ _____	_____
Stocks & Bonds	\$ _____	_____
Mutual Funds	\$ _____	_____
IRA / Pension	\$ _____	_____
IRA / Pension	\$ _____	_____
Certificate of Deposit	\$ _____	_____
Certificate of Deposit	\$ _____	_____
Money Market Account	\$ _____	_____
Regular Savings Account	\$ _____	_____
Checking Account	\$ _____	_____
Other _____	\$ _____	_____
Other _____	\$ _____	_____
Total Value of Estate	\$ _____	_____