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### ESTATE PLANNING QUESTIONNAIRE

Confidentiality: The following information will be held in the strictest confidence. Please complete the questionnaire as thoroughly and as accurately as possible.

Date Completed: \_\_\_\_\_

#### Part I- Personal Information of Client

Full Legal Name:

Client 1: \_\_\_\_\_

Client 2: \_\_\_\_\_

Date of Birth: Client 1: \_\_\_\_\_ Client 2: \_\_\_\_\_

Age: Client 1: \_\_\_\_\_ Client 2: \_\_\_\_\_

Legal Address: \_\_\_\_\_

County of Residence: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Cell Phone Client 1: \_\_\_\_\_ Cell Phone Client 2: \_\_\_\_\_

Primary Occupation: Client 1: \_\_\_\_\_

Employer's Name: \_\_\_\_\_

Client 2: \_\_\_\_\_

Employer's Name: \_\_\_\_\_

Marriage Date: \_\_\_\_\_

**Part II- Client's Children Information**

If any child listed is not a child of your present marriage, please place an asterisk beside that child's name, indicating whether you or your spouse/significant other is the parent of a child by a previous marriage.

| Child's Legal Name | Full Address | Phone & Email | Birth Date | Spouse | Children (Grandchildren) |
|--------------------|--------------|---------------|------------|--------|--------------------------|
|                    |              |               |            |        |                          |
|                    |              |               |            |        |                          |
|                    |              |               |            |        |                          |
|                    |              |               |            |        |                          |
|                    |              |               |            |        |                          |
|                    |              |               |            |        |                          |
|                    |              |               |            |        |                          |
|                    |              |               |            |        |                          |

Do you have any predeceased children? Yes \_\_\_\_\_ No \_\_\_\_\_

For predeceased children, please list their name(s) and the name(s) of their children, if applicable:

Child: \_\_\_\_\_ their children \_\_\_\_\_

Child: \_\_\_\_\_ their children \_\_\_\_\_

**Part III- Client's Dependent Information**

Please list the names of any other dependents.

| Dependent's Legal Name | Full Address | Phone & Email | Birth Date | Relationship |
|------------------------|--------------|---------------|------------|--------------|
|                        |              |               |            |              |
|                        |              |               |            |              |
|                        |              |               |            |              |

**Part IV- Asset Summary**

List the approximate value of each asset. Indicate whether the asset is owned individually, or jointly, by entering the value under the appropriate owner.

**Monthly Income**

|                        | Client 1 | Client 2 | Joint |
|------------------------|----------|----------|-------|
|                        |          |          |       |
| Employment             |          |          |       |
| Pension                |          |          |       |
| Pension                |          |          |       |
| IRA's, Annuities, etc. |          |          |       |
| Rents                  |          |          |       |
| Business Interest      |          |          |       |
| Interest and Dividends |          |          |       |
| Other                  |          |          |       |
| <b>Total:</b>          |          |          |       |

| Type of Asset  | Client 1 Separate Property | Client 2 Separate Property | Joint Property |
|--|----------------------------|----------------------------|----------------|
| Cash, Checking Accounts, Savings Accounts, CD's  |                            |                            |                |
| Publicly Traded Stocks & Bonds, Mutual Funds, Brokerage Accounts                                 |                            |                            |                |
| Unlisted Securities  |                            |                            |                |
| Business Interests, including closely-held stock and partnership interests. Buy-sell agreements? |                            |                            |                |
| Retirement Benefits – Est. Current Values (IRA's, Pensions, 401(k))                              |                            |                            |                |
| Annuities  |                            |                            |                |
| Estimated Current Cash Value of Life Insurance   |                            |                            |                |
| Accounts, Notes, Loans, Mortgages, Receivable  |                            |                            |                |
| Miscellaneous Household Property   |                            |                            |                |
| Automobiles  |                            |                            |                |
| Other Assets – including collections   |                            |                            |                |
| Real Estate  |                            |                            |                |
| <b>Total Assets</b>  |                            |                            |                |