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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:

Mr. ____

Mrs.____

Date of Birth: Mr.________________________Mrs._________________________

Age: Mr.____________________________Mrs.____________________________

Legal Address:____

County of Residence:____

Home Phone:_____________________

Cell Phone Mr.:_________________ Cell Phone Mrs:_________________

Primary Occupation: Mr.____
Employer's Name:___________________________________

Mrs.____
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 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 VI- Gift History
List all gifts made by you or your spouse in excess of $1,000 in the last five years.

Date of Gift	Recipient	Value

Have you or your spouse ever filed a gift tax return? _______Yes_______No
If yes, provide copies of all returns.

Part IV- Asset/Liability Summary

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

Type of Asset	**Client's Separate Property**	**Spouse's 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			
Total Assets			

Liabilities

Liabilities	Client's Separate Property	Spouse's Separate Property	Joint Property
Current Debts/Credit Cards			
Bank Loans			
Other Debts			
Total Liabilities			
Estimated Combined Present Net Worth (Total Assets less Total Liabilities)			

****Other Debts:** Describe any other liabilities, including threatened or pending litigation or reasonably ascertainable creditors:______________________________
____

Monthly Income

	Client	**Spouse**	**Joint**
Employment			
Pension			
Pension			
IRA's, Annuities, etc.			
Rents			
Business Interest			
Interest and Dividends			
Other			
Total:			

Indicate which sources of income have benefit for a surviving spouse:

____
____

Part V- Other Information
What are your estate planning objectives? (Help children, avoid death taxes, avoid probate, protect assets from nursing homes, make charitable gifts, etc.

____
____
____
____

Is there any reason to treat children (or grandchildren) <u>other than equally?</u> If so, please explain.

____
____
____
____

Do you, your spouse or any of your or your spouse's children (or grandchildren) have any special needs or disabilities? If so, please explain.

____
____
____
____

Is this a second marriage for either you or your spouse?_______Yes_______No

Is there a pre-martial agreement? _______Yes_______No

Is there a post-marital agreement? _______Yes_______No

If you or your spouse have ever been divorced, do you or your spouse have any payment obligations either to a former spouse or to children of a prior marriage embodied in any court decree or written agreement? _______Yes_______No

If yes, please provide copies of this documentation.

Has a prepaid funeral trust been established for you? _____Yes_____No

Has a prepaid funeral trust been established for your spouse? _____Yes____No