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ESTATE PLANNING QUESTIONNAIRE

This estate planning questionnaire is designed to help evaluate the nature of your planning needs. Please complete it and bring it to your appointment along with copies of any existing wills, trusts, powers of attorney and any other relevant documents you have (deeds, titles, insurance policies, etc...). These, along with the questionnaire, will assist us in determining your needs and developing an estate plan to meet your needs.

Date: _____

FULL NAMES _____ Date of Birth _____ SS _____

#

Husband: _____

Wife: _____

Address: _____ Phone: _____

City, County, State: _____

Citizenship: Husband _____ Wife _____

Date & place of marriage: _____

Previous marriages (Yes or No) _____

Financial commitments from prior marriage (Y or N) _____

Premarital agreement (Y or N) _____

CHILDREN

Please list on the back the names of your children, their age, whether they are from a prior marriage, whether they are adopted, whether they are married, have children, and whether they have any special needs (disability).

Do you have any other dependents? _____

Are there any other persons you may name in your will? _____

Are you expecting to receive an inheritance from anyone? _____

Are you the beneficiary of a trust? _____

Have you or your spouse made any gifts exceeding \$10,000 to one person in any year? _____

Have you executed a will or trust previously? _____ (if yes please bring copy)

Do you have a safe deposit box? _____

Do you have an accountant or other financial advisor? _____

name and address _____

HAVE YOU CONSIDERED

Who should be guardian for your minor children, if any? _____

Who should be your executor or trustee? _____

Making a charitable donation from your estate? _____

Making specific gifts to any particular persons? _____

PLEASE CHECK WHICH OF THE FOLLOWING TYPES OF PROPERTY YOU OWN

Checking acct

Savings

CD's

IRA

Stocks

Mutual Funds

Bonds

Notes payable to you

Oil & Gas interests

Home

Second home

Other real Estate

Life Insurance

Autos

Boats, RV's etc...

Collections (antiques, coins etc...)

Pension

Do you own a business?

other

LIABILITIES

Home Mtg

Other notes

Other

Does the total value of your assets, including life insurance, exceed \$1,000,000 (if so there may be estate tax issues to consider)? _____

Please list below any questions or concerns you want to discuss