

GLEASON & DOTY, CHARTERED

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TELEPHONE: A/C 785-242-3775
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ESTATE PLANNING QUESTIONNAIRE

Date: _____

FULL NAMES

Husband: _____ Wife: _____

Address: _____

Phone: _____ email _____

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)

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 owed to you
Oil & Gas interests	Home	Second home	Other real Estate
Life Insurance	Autos	Boats, RV's etc...	Collections
Pension	Business	other	(antiques etc...)

LIABILITIES

___ Home Mtg ___ Other notes ___ Other

Does the total value of your assets, including life insurance, exceed \$5,000,000 (if so there may be estate tax issues to consider)? _____

Please list on back any questions or concerns you want to discuss