ESTATE PLANNING QUESTIONNAIRE FOR PERSONAL AND FINANCIAL INFORMATION

Date Prepared: ____/____/0___

I. FAMILY FACTS

Is Husband a U.S. Citizen? Yes _____ No _____ Is Wife a U.S. Citizen? Yes _____ No _____

A. Husband Name: ______________________________________ Birth Date: ___________________________

Soc. Sec. No.: ______________________________________ Birth Place: ___________________________

Wife Name: ______________________________________ Birth Date: ___________________________

Soc. Sec. No.: ______________________________________ Birth Place: ___________________________

B. Home Address: ____

Telephone Numbers: Home: ___________________________ Office: ___________________________

Business Address: ____

C. Date of Marriage: ___________________________ Prior Marriages? Yes _____ No _____

D. Previous Names (Prior marriages): ____

How marriage(s) ended:____

E. Children (Natural or adopted):

Name	Birth Date	Address/Phone No.
1.	/ /	
2.	/ /	
3.	/ /	
4.	/ /	
5.	/ /	
6.	/ /	

F. Stepchildren:

Name/Parent	Birth Date	Address/Phone No.
1.	/ /	
2.	/ /	
3.	/ /	
4.	/ /	

G. Grandchildren:

Name/Parent	Birth Date	Address/Phone No.
1.	/ /	
2.	/ /	
3.	/ /	
4.	/ /	

H. Other dependents? If yes, please attach a separate sheet with the information requested above, specifying relationship.

II. REAL PROPERTY

For each piece of property you own, please list the following information. ***PLEASE SUPPLY A COPY OF THE DEED BY WHICH YOU ACQUIRED EACH PIECE OF PROPERTY AND INCLUDE THE ASSESSOR'S PARCEL NUMBER IF KNOWN.***

Address	Date Acquired	Purchase Price	Current Value	Liens	How is Title Held?
	/				
	/				
	/				
	/				

III. STOCK AND BONDS/MUTUAL FUND ACCOUNTS (NON - IRA/RETIREMENT PLAN)

For any stocks, bonds, or mutual funds which you own in a brokerage account other than those held in an Individual Retirement Account or other retirement plan, please list the following information. ***PLEASE BRING COPY OF LAST STATEMENT FOR EACH.***

Institution Name and Address	Approximate Value	Account No.	Owner(s) on Account

Please list the name of your stock brokers on the above accounts: ____

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IV. OTHER STOCKS AND BONDS (NON - IRA/RETIREMENT PLAN)

For any stocks or bonds for which you hold the certificates, please list the following information. ***PLEASE BRING A COPY OF EACH STOCK CERTIFICATE OR BOND.***

Name of Company	No. of Shares	How Owned?	Value/Share	Total Value

V. IRA/RETIREMENT PLAN ASSETS

For any Individual Retirement Accounts or other retirement plans, please list the following information. ***PLEASE BRING COPIES OF THE LAST ACCOUNT STATEMENT AND CURRENT BENEFICIARY DESIGNATION FOR EACH WITH YOU.***

Name and Address of Account Custodian	Approximate Value	Account Number	Owner

VI. LIFE INSURANCE

For each life insurance policy you own, please list the following information. ***PLEASE BRING A COPY OF EACH POLICY***.

Company Name	Policy No.	Insured	Owner/Beneficiary	Face Amount

PLEASE LIST THE NAME OF YOUR INSURANCE AGENT ON THE ABOVE POLICIES: ______________________________

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VII. OTHER INVESTMENTS

Please list any other investment assets which are not otherwise scheduled. (Eg. Limited partnerships, businesses operated as a sole proprietor, time shares, oil and mineral rights, etc.) ***PLEASE BRING COPY OF ANY IDENTIFYING DOCUMENT.***

Description	Date of Acquisition	Estimated Value

VIII. BANK ACCOUNTS

Please list all bank accounts not otherwise scheduled. ***(PLEASE PROVIDE COPY OF LAST STATEMENT ON EACH ACCOUNT.)***

Bank Name/Address	Account Number	Account Type and How Owned? (ckg./savings/CD - joint or individual)	Approximate Balance

IX. GIFTS

Please list all gifts (other than to a bona fide charity) in excess of $10,000 during your lives. ***(PLEASE PROVIDE COPY OF ANY GIFT TAX RETURNS — FORM 709.)***

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IX. PLANNING DECISIONS

Who will act as the trustee of your trust if you are no longer able to act due to death or disability?

❑ Spouse ❑ Other: (Give name and address) ____

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Do you want the same persons to act as the Personal Representative of your Will?

❑ Yes ❑ No: (Give name and address) ____

____

If you have minor children, who do you want to act as their guardian until age 18? (List name and address)

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Before you come for your appointment you should give some thought to the following issues:

- Who you want to receive your estate after your death and whether any special restrictions are to be placed on distribution. Typical issues this raises are:
  - Whether there are specific assets you want to go to particular individuals.
  - When minor children should receive their shares of the estate.
  - Whether a bequest to a charity is desirable.
- Whether you want to have a Durable Power of Attorney for Health Care, giving some third party (typically your spouse or your children) the power to make health care decisions for you if you become unable to do so yourself.
- Whether you want to have a Durable Power of Attorney for Asset Management, giving some third party (typically your spouse) the power to make asset management decisions for you if you become unable to do so yourself.

QUESTIONS YOU HAVE THOUGHT OF AND WANT TO ASK THE ATTORNEY:

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