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ESTATE PLANNING QUESTIONNAIRE

PERSONAL AND FAMILY INFORMATION

When filling out the questions below, please use full, legal names, correct spelling, and correct dates.

Your Name____ **Date of Birth** ____________________

Spouse's Name_____________________________________ **Date of Birth** ____________________

Home Address ____

Telephone Number______________________________**Cell Number** ___________________________

Email ____

Spouse Cell______________________________**Spouse Email** ___________________________________

YOUR CHILDREN, THEIR SPOUSES, AND THEIR CHILDREN

<u>Child #1</u>

Name _______________________________________ **Date of Birth** _____________________

Personal Data (Specify if the child is from prior marriage, adopted, deceased, etc)

____

Child's Spouse ____________________________________

Children and their dates of birth ____

____

Child #2

Name____ Date of Birth _______________________

Personal Data (Specify if the child is from prior marriage, adopted, deceased, etc)

____

Child's Spouse ______________________________________

Children and their dates of birth ____

____

Child #3

Name____ Date of Birth _______________________

Personal Data (Specify if the child is from prior marriage, adopted, deceased, etc)

____

Child's Spouse ______________________________________

Children and their dates of birth ____

____

(If more than 3 children, please use additional paper)

Is there other important personal information that might affect your estate plan? For example, does a member of your family have a serious long-term medical or physical need that will require special care or attention in the future?

____

____

If there are no children, please list three people you want to include as an heir to your Estate Plan:

1. ____

2. ____

3. ____

ESTATE PLANNING CHECKLIST

This checklist and asset inventory will allow you to see what your assets are and will be helpful when talking to our Estate Planning Attorney.

Please check the following assets you currently own/possess:

- Life Insurance
- Real Estate
- Vehicles
- Personal Property (Jewelry, furniture, art, antiques, etc)
- Bank Accounts
- Certificates of Deposit
- Annuities
- IRA’s
- 401K/ 403B/ Pension Plan
- Investments (Non 401K/ IRA)
- Business Interest
- Future Inheritances
- Interests in Estates of Trusts
- Outstanding Liabilities
- Fiduciaries
- Other: ____

ASSET INVENTORY

Property: List each piece of real property (house and real estate), including address, legal description, and when it was obtained.

Property	Address	Description	Date Obtained	Value
1				
2				
3				

Notes and Cash: List all checking accounts, savings accounts, Money Markets, and CDs with Bank name, address, and balance.

Account	Bank Name	Bank Address	Balance
Checking			
Savings			
Other			
Other			

Business Interests: List the name of the business, the type of business (partnership, LLC, etc) and the approximate value.

____

Value $____________________________________

Stocks and Bonds: List all stocks and/or bonds including the name of financial institution, address of financial institution, shares and value.

____

Value $________________________________

____

Value $________________________________

Miscellaneous: List the total value and location of each of the following:

Clothing, furniture, jewelry, etc.

Item and Location ________________________ $______________________________

Item and Location ________________________ $______________________________

Item and Location ________________________ $______________________________

Life Insurance, Retirement Plans, IRA's, Pensions Value:

Item and Location ________________________ $______________________________

Item and Location ________________________ $______________________________

As you review this checklist, you can see there is monetary value in each of these categories. Bring this inventory with you when you meet with our Estate Planning Attorney.
Please note: this list is only a sampling of assets and is not all inclusive.