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Family Estate Planning Questionnaire

FAMILY BACKGROUND INFORMATION

1. Your Name: _____

Spouse: _____

Other Names: _____

Client: USA Citizen: Yes No If no, where: _____

Spouse: USA Citizen: Yes No If no, where: _____

2. Resident: _____

Street: _____

City: _____ State: _____ Zip: _____

Business Address:

Street: _____

City: _____ State: _____ Zip: _____

3. Telephone: Residence: _____ Cell: _____

Business: _____ Cell: _____

Email(s): _____

4. Date of Marriage: _____ Place: _____

5. Birth Date: Yours: _____ Spouse's: _____

6. Social Security Number:

Yours: _____ N/A _____ Spouse's: _____ N/A _____

7. Children of this marriage, if any:

_____	D.O.B. _____
_____	D.O.B. _____
_____	D.O.B. _____
_____	D.O.B. _____
_____	D.O.B. _____
_____	D.O.B. _____

8. Prior Marriage(s) if any: List name of former spouse(s):

Client: _____

Spouse: _____

Children of prior marriage(s), if any:

_____	D.O.B. _____
_____	D.O.B. _____
_____	D.O.B. _____

9. Spouses of children:

Name(s) of your child	Name of child's spouse
_____	_____
_____	_____
_____	_____

10. Deceased children, if any: _____

11. Grandchildren:

Name: _____ Parent: _____

Name: _____ Parent: _____

Name: _____ Parent: _____

12: Living Parents:

Yours: _____, _____

Spouses: _____, _____

13: Brothers and Sisters:

Yours: _____, _____

_____, _____

Spouse's: _____, _____

_____, _____

14. Marriage Agreements: (If yes, give copy to attorney)

Before Marriage: Yes No After Marriage: Yes No

15. Any Obligations From Prior Marriages?: Yes No

(If Yes, provide copy of divorce decree and property settlement.)

Child Support Spousal Support Life Insurance Ret. Plan

ASSET CLASSIFICATION INFORMATION

16. How is title held on your home?

Joint Tenancy (JT)

Other: _____

What is the approximate fair market value: \$ _____

17. How is title held on your other real property assets?

a) Name of property and/or address: _____

Joint Tenancy (JT)

Other: _____

What is the approximate fair market value: \$_____

b) Name of property and/or address: _____

Joint Tenancy (JT)

Other: _____

What is the approximate fair market value: \$_____

18. What other assets do you have? Please list approximate values:

Stocks and Bonds: \$ _____

How many different brokerage accounts do you have? _____

Name of brokerage companies: _____

Do you have physical possession of any stock certificates? Yes No

If Yes, what companies and how many shares:

Life Insurance Policies:

_____ \$ _____

_____ \$ _____

IRA, 401K and other Retirement Accounts:

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

Bank Accounts:

_____ \$ _____

_____ \$ _____

Money Markets and CD's:

_____ \$ _____

_____ \$ _____

Other Assets: (Please describe below)

_____ \$ _____

_____ \$ _____

SUCCESSOR TRUSTEES, EXECUTORS AND GUARDIANS FOR MINOR CHILDREN

19. Successor Trustees: Who is to manage the trust after both of you are deceased?

1st _____ 2nd _____

3rd _____

NOTE: YOUR NAMES DO NOT APPEAR IN ITEMS 20-25. THESE ARE THE TWO ALTERNATES FOR EACH OF YOU AS YOU ARE THE PRIMARY NAMED PERSON FOR EACH OTHER.

20. Executor of Your Will: Who will administer your probate estate and file a guardianship petition with the probate court after you and your spouse are deceased?

1st _____ **2nd** _____

21. Executor of Spouse's Will: Same question as 20 for spouse to answer

1st _____ **2nd** _____

22. Durable Power of Attorney – Property for YOU:

1st _____ **2nd** _____

23. Durable Power of Attorney – Property for YOUR SPOUSE:

1st _____ **2nd** _____

24. Advanced Directive: Health Care Decisions- Alternates for YOU:

1st _____ **2nd** _____

25. Advanced Directive: Health Care Decisions- Alternates for YOUR SPOUSE:

1st _____ **2nd** _____

26. Nomination of GUARDIANS for MINOR CHILDREN:

1st _____ **and/or** _____

2nd _____ **and/or** _____

27. Distribution of your estate:

A. Do you wish to make any gifts of specific items of tangible personal property?

B. Do you wish to make gifts to any churches or charities? _____

C. Do you wish to make any specific gifts of cash or other property to any one specific person? _____

D. How do you wish to distribute the rest of your estate and under what terms and/or conditions (age, college etc.)? _____

28. Burial/Cremation Instructions: _____

29. Are there any other issues that are of concern to you that you wish to address with me at our next meeting? _____
