

ESTATE PLANNING QUESTIONNAIRE

GENERAL INFORMATION

(Please Print Clearly)

DATE PREPARED:

Full Name _____ Date of Birth _____

Spouse's Full Name _____ Date of Birth _____

Address _____

City _____ State _____ Zip Code _____

Phone (Area Code): Home () _____ Offc: () _____ (H/W)
 Cell: () _____ Offc: () _____ (H/W)

Citizenship: Husband _____ Wife _____

Children (if any):

FULL NAMES	LIVING		DATE OF BIRTH	MARRIED		NO. OF CHILDREN, IF ANY
	YES	NO		YES	NO	

Occupation: _____ Company: _____

Prior Marriage/Former Spouse: _____

Children from former marriage: _____

Additional Comments:

- A. Executor(s):
1. Primary _____
 2. Successor(s) _____

- B. Trustees:
1. Primary _____
 2. Successor(s) _____

- C. Guardians of Minor Children (*if any*):
1. Primary _____
 2. Successor(s) _____

- D. Distribution of Assets Upon Death of First Spouse (*if any*):
1. Tangible Personal Property (*artwork, jewelry, automobiles, etc.*):

2. Real Property:

3. Balance of Assets shall be distributed as follows:

- E. Distribution on Death of Surviving Spouse (*Last to Die*)
1. Tangible Personal Property (*artwork, jewelry, automobiles, etc.*):

2. Balance of Assets shall be distributed as follows:

F. Property Distributed to Spouse shall be made: Outright Trust

G. Property Distributed to Children shall be held in lifetime trusts or paid at specified ages.
If age distribution: _____

8. Life Insurance:

ESTATE PLANNING WORKSHEET

Assets	Yours	Your Spouse's	Joint/Community
Checking & Savings	\$	\$	\$
Money Market Funds			
CDs			
Stock & Stock Funds			
Taxable Bonds & Bond Funds			
Tax-Exempt Bonds & Bond Funds			
Other Marketable Securities			
Annuities			
Limited Partnerships			
Personal Residence			
Real Estate (Non-Residence)			
Life Insurance Face Amount (Loans)/(Cash Value)			
Business Interests			
Other Non-Marketable Assets			
Personal Property (autos, jewelry, antiques)			
Other Personal Assets (jewelry, art, etc)			
IRAs (Length)			
Retirement Plan Accounts (401-K)			
Total Assets	\$	\$	\$
Liabilities	Yours	Your Spouse's	Joint/Community
Credit Card Debt	\$	\$	\$
Margin Debt			
Personal Loans			
Other Short-Term Debt (Credit Cards)			
Home Mortgage			
Real Estate Mortgages			
Auto Loans (Bank Loans)			
Business Notes			
Other Long-Term Debt			
Total Liabilities	\$	\$	\$
Subtract total liabilities			
from total assets for			
Total Gross Estate	\$	\$	\$

Other Comments:

ADVISORS

ACCOUNTANT

Name _____

Address _____

Phone Number _____

BROKER

Name _____

Address _____

Phone Number _____

LIFE INSURANCE AGENT

Name _____

Address _____

Phone Numbers _____

FINANCIAL PLANNER

Name _____

Address _____

Phone Number _____

BANK

Name _____

Address _____

Phone Number _____