

ESTATE PLANNING QUESTIONNAIRE

PERSONAL AND FAMILY INFORMATION

Husband's Name _____

Date of Birth _____ Citizenship _____

Home Address _____

City, State, Zip _____

Telephone No. _____

Husband's Occupation _____ Soc Sec. No. _____

Name of Employer _____

Business Address _____

City, State, Zip _____

Work Telephone No. _____

Wife's Name _____

Date of Birth _____ Citizenship _____

Home Address _____

City, State, Zip _____

Telephone No _____

Wife's Occupation _____ Soc Sec. No. _____

Name of Employer _____

Business Address _____

City, State, Zip _____

Work Telephone No. _____

Children or Other Beneficiaries

Name	Relationship	DOB	SS#
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Assets and Liabilities

Assets	Total Values Owned by		
	Husband	Wife	Jointly
Case (bank accounts, CDs)	\$ _____	\$ _____	\$ _____
Socks and Bonds	\$ _____	\$ _____	\$ _____
Notes and Receivables (money owed to you)	\$ _____	\$ _____	\$ _____
Businesses you own	\$ _____	\$ _____	\$ _____
Home (show mortgage amount below)	\$ _____	\$ _____	\$ _____
Other real estate (show mortgage amt below)	\$ _____	\$ _____	\$ _____
Insurance on husband's Life (face amt)	\$ _____	\$ _____	\$ _____

Insurance on wife's life (face amt)	\$ _____	\$ _____	\$ _____
Retirement plans (death benefits)	\$ _____	\$ _____	\$ _____
Furniture & Furnishings	\$ _____	\$ _____	\$ _____
Other personal property (cars, jewelry, etc)	\$ _____	\$ _____	\$ _____
Other assets (not described above)	\$ _____	\$ _____	\$ _____
<i>TOTAL ASSETS</i>	\$ _____	\$ _____	\$ _____

LIABILITIES	Total Amounts Owned By		
	Husband	Wife	Jointly
Mortgage on Home	\$ _____	\$ _____	\$ _____
Mortgage on other real Property	\$ _____	\$ _____	\$ _____
Loans against life insurance	\$ _____	\$ _____	\$ _____
Other Debts	\$ _____	\$ _____	\$ _____
<i>TOTAL LIABILITIES</i>	\$ _____	\$ _____	\$ _____
Net Worth	\$ _____	\$ _____	\$ _____
Combined Net Worth			\$ _____

DEATH BENEFITS
 (Life Insurance and retirement plans)

Name of Policy or Plan	Death Benefit	Present Value	Beneficiary
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____

OTHER INFORMATION

1. Please supply copies of your present wills, any trusts you have created (revocable or irrevocable), any declarations regarding medical treatment (living wills), and any “durable” powers of attorney.
2. If you have ever filed any gift tax returns, please supply copies of those returns.
3. If you hold any accounts or own any property jointly with anyone other than your husband or wife, please describe the property, the nature of your interest, and the names of the co-owners.

4. If you own a business (and for each business you own), respond to questions 5 – 7.
5. Please supply a copy of the most recent financial statement for the business.
6. If your business is a partnership, what is your interest and who are the other partners? If it is a corporation, how much and what kind of stock is outstanding and who owns it (and in what amounts)? _____

7. If there is a partnership or shareholder agreement, please supply a copy of the agreement.
8. If you have a written employment agreement with any corporation, please supply a copy of the agreement.
9. Are you entitled to receive the income or principal from any existing trust or estate? Please describe your interest: _____

10. Do you expect to inherit any property from anyone else? _____

11. If you have been married before, please provide the name of your previous husband or wife and the date of the death or divorce.
12. If you are obliged to provide in your will for, or support during your lifetime, your former husband or wife or any children from a previous marriage, please supply a cop of your divorce agreement or decree.
13. If you have signed a premarital or prenuptial agreement, please supply a copy.
14. Are you under any other obligation to leave any part of your estate to any particular person or in any particular way? _____

15. Please supply the names and addresses of your accountant, insurance agent, and any other tax or investment advisors.