



ESTATE PLANNING QUESTIONNAIRE

PERSONAL INFORMATION

Grantor #1 _____ **DOB** ___/___/_____ **U.S Citizen** Y N

Grantor #2 _____ **DOB** ___/___/_____ **U.S Citizen** Y N

Address _____ **E-Mail:** _____

City/State _____ **Zip** _____

Home Phone _____ **Cell (#1)** _____ **Cell (#2)** _____

Grantor #1 Employer _____ **Position** _____

Employer plans: *Pension:* Yes No *401(k):* Yes No *Profit Sharing:* Yes No

Grantor #2 Employer _____ **Position** _____

Employer plans: *Pension:* Yes No *401(k):* Yes No *Profit Sharing:* Yes No

Do you have:	Grantor #1		Grantor #2	
Will	Yes	No	Yes	No
Trust	Yes	No	Yes	No
Power of Attorney	Yes	No	Yes	No
Terminal Illness Declaration	Yes	No	Yes	No
Safe Deposit Box	Yes	No	Yes	No
Cemetery Plots	Yes	No	Yes	No
Prepaid Burial Plans	Yes	No	Yes	No
Financial Planner	Yes	No	Yes	No
Accountant	Yes	No	Yes	No
Insurance Agent	Yes	No	Yes	No
Disability Insurance	Yes	No	Yes	No
Nursing Home Insurance	Yes	No	Yes	No

FAMILY INFORMATION

Name	DOB	Child from current or prior relationship?
Children:		
_____	_ / _ / _	_____
_____	_ / _ / _	_____
_____	_ / _ / _	_____
_____	_ / _ / _	_____
_____	_ / _ / _	_____

Grandchildren:		
_____	_ / _ / _	_____
_____	_ / _ / _	_____
_____	_ / _ / _	_____
_____	_ / _ / _	_____
_____	_ / _ / _	_____
_____	_ / _ / _	_____

If any of your children are under 18 years of age, who would you like to have raise them (a first choice and an alternative)?

_____ then (if applicable) _____

Do any of your children have special needs?

FINANCIAL INFORMATION - ASSETS

Real Estate:

Residence: Address _____ Value \$ _____

Declaration of Homestead filed? _____

Other real estate: Address _____ Value \$ _____

Address _____ Value \$ _____

Personal Property:

Checking Account(s) Bank _____ Amount \$ _____
Account # _____
Held in Joint Tenancy? Yes No

Bank _____ Amount \$ _____
Account # _____
Held in Joint Tenancy? Yes No

Bank _____ Amount \$ _____
Account # _____
Held in Joint Tenancy? Yes No

Savings Account(s) Bank _____ Amount \$ _____
Account # _____
Held in Joint Tenancy? Yes No

Bank _____ Amount \$ _____
Account # _____
Held in Joint Tenancy? Yes No

Bank _____ Amount \$ _____
Account # _____
Held in Joint Tenancy? Yes No

Money Market Bank _____ Amount \$ _____
Account # _____
Held in Joint Tenancy? Yes No

Stock Market Accounts Broker _____ Amount \$ _____
Account # _____
Held in Joint Tenancy? Yes No

Mutual Fund Accounts Company _____ Amount \$ _____
Account # _____
Held in Joint Tenancy? Yes No

IRA – Grantor #1 Company _____ Amount \$ _____
Account # _____
Beneficiary _____

IRA – Grantor #2 Company _____ Amount \$ _____
Account # _____
Beneficiary _____

Annuities Company _____ Amount \$ _____
Account # _____
Beneficiary _____

Timeshares Company _____ Value \$ _____
Account # _____
Beneficiary _____

Cryptocurrency Company _____ Value \$ _____
Account # _____
Beneficiary _____

Life Insurance (Grantor #1) Company _____ Amount \$ _____
Policy # _____
Beneficiary _____

Company _____ Amount \$ _____
Policy # _____
Beneficiary _____

Life Insurance
(Grantor #2)

Company _____ Amount \$ _____
Policy # _____
Beneficiary _____

Company _____ Amount \$ _____
Policy # _____
Beneficiary _____

Vehicles – Grantor #1

Make _____ Value \$ _____
Model _____
Year _____
Paid Off YES or NO

Vehicles – Grantor #2

Make _____ Value \$ _____
Model _____
Year _____
Paid Off YES or NO

“Toys” (e.g. boats, trailers, ATVs, motorcycles, etc.)

Business Interests

Name of Company

% Interest in Company

ESTATE PLANNING

WE WILL NEED THE FOLLOWING INFORMATION TO PREPARE YOUR ESTATE PLANNING DOCUMENTS:

1. **Wills**

Executor of Wills – This is the person responsible for probating your estate, if necessary. Please list your first choice and an alternate.

Grantor #1 _____ then _____

Grantor #2 _____ then _____

2. **Trust (if applicable)**

Trust Name (if applicable) _____

Successor Trustee (if applicable) _____ then _____

Who gets your estate when both of you are gone? Please provide names & dates of birth for each beneficiary _____

How much for each person/entity/animal? (It is best to think in terms of percentages)

At what age(s) do they receive it or would you like to keep it in trust?

Are there any other specifications that relate to distributions?

Do you intend to gift any specific items of personal property (e.g., jewelry, guns, art, coin collections, etc.) or other asset to someone specifically? If so, please list the item and the full name of who it should be given to:

_____ goes to _____

_____ goes to _____

_____ goes to _____

3. **Disposition Instructions**

Grantor # 1

Do you wish to be **buried** or **cremated** or **something else**? Please circle one.

Do you wish to make an anatomical gift upon your death? **Yes** or **No**? Please circle one.

Who do you wish to name as an alternate designee to ensure your instructions are carried out if your partner is unable to? _____

Grantor #2

Do you wish to be **buried** or **cremated** or **something else**? Please circle one.

Do you wish to make an anatomical gift upon your death? **Yes** or **No**? Please circle one.

Who do you wish to name as an alternate designee to ensure your instructions are carried out if your partner is unable to? _____

Do you have any special wishes/ instructions? _____

4. **Healthcare Power of Attorney (Living Will)**

Who would you like to make healthcare decisions for you if both you and your partner cannot act (i.e. within the provision of your wishes as stated in the document)?

Grantor #1 _____
Address _____ then, _____
Phone _____

Grantor #2 _____
Address _____ then, _____
Phone _____

5. **Financial Power of Attorney**

Who would you like to make financial decisions for you if both of you cannot act?

Grantor #1 _____
Address _____ then, _____
Phone _____

Grantor #2 _____
Address _____ then, _____
Phone _____

WHAT YOU SHOULD BRING WITH YOU:

- Existing Estate Planning Documents (Wills, Trust, etc.)
- Deeds or Title Policies for Real Estate
- Bank Statements
- Retirement Account/Pension Statements and Information
- Life Insurance Policy Statements
- Vehicle Titles

WHAT WE CAN DO FOR YOU

WE WILL MEET WITH BOTH OF YOU FOR AN INITIAL CONSULTATION.

WE CAN PREPARE THE FOLLOWING DOCUMENTS SPECIFICALLY TAILORED TO MEET YOUR ESTATE PLANNING NEEDS:

- | | |
|-------------------------------|---|
| Revocable Trust | Disposition Instructions |
| Certificate of Trust | Guardianship Nomination |
| Pour-Over Wills | Homestead Declaration (including recordation) |
| Personal Property Lists | Quitclaim Deeds for Real Estate (including recordation) |
| Terminal Illness Declarations | Assignment of Personal Property |
| Medical Power of Attorney | Assignment of Business Interests |
| Financial Power of Attorney | |