

ESTATE PLANNING QUESTIONNAIRE

The following is a preliminary list of the data, information and documents to begin your estate planning. Please provide as much of the requested data, information and documents as possible.

Documents

Please provide copies of the following documents. You may provide originals or copies.

- Current Wills and all Codicils
- Current Trusts and all amendments to all trusts
- Community Property Agreements
- Pre-marital or post-marital agreements
- Property settlement agreements or judgments of dissolution of marriage for any prior marriages

Client Information

- Name of Husband
- Name of Wife
 - Maiden Name
- Residence address
- Telephone Numbers
 - Home
 - Work
 - Cell

- Residence fax
- Residence email
- County of residence
- Citizenship of Husband
- Citizenship of Wife
- Date of birth of Husband
- Date of birth of Wife
- Name of former spouses
- Dates of marriages

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Children

- Full names, Addresses and Dates of Birth (death if applicable)
 - 1.
 - 2.
 - 3.
 - 4.
 - 5.

Executor/Trustee Information

In your estate plan, you will name someone to be the Executor of your Will and, if applicable, the successor Trustee of your Trust. Spouses usually, but not always, name the other spouse as their Executor and successor Trustee. However, additional successor Executors and Trustees should be selected. You may name Co-Executors or Co-Trustees. You may also name a bank or trust company to act as Executor or Trustee.

- Primary
- Additional
- Additional

Primary Care Physician

In your Advance Health Care Directive, you may designate a primary care physician who will be the physician who will act with your designated agent to make health care decisions for you should you be unable to do so yourself.

- Primary Care Physician
- Address
- Telephone Number

Beneficiary Information

Please provide information regarding each beneficiary of your Will or Trust. While most beneficiaries will be surviving spouse and children, you may wish to name others as beneficiaries of your Will or Trust as well. The beneficiaries you name may be contingent beneficiaries; that is, they will not receive a gift or any portion of your estate unless another person has died. You may also wish to name one or more charities as possible beneficiaries. Please indicate if the beneficiary is a grandchild (or in the same generation as a grandchild); and, if so, if either of the beneficiary's parents are now alive.

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Business Interests

Please list all business interests in which you have any interest (closely-held corporations, both regular and S corporations, partnerships, limited liability companies, and sole proprietorships).

Real Property

Please provide information and documents regarding any real property you own, whether in your name alone, or in some other manner, form or entity. Also indicate whether the property is your principal residence, vacation residence, income property, vacant land, etc.

- Property
- Assessor Parcel Number
- Manner in which title is held
- Deeds
- Most recent property tax bill
- Appraisals
- Leases

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Life Insurance

Please provide information regarding all life insurance policies.

- Insurance Company
- Policy Number
- Face amount of insurance
- Beneficiary

Annuities and Pensions

Please provide information regarding any annuities, pensions, profit sharing plans, 401(k) plans, IRA accounts, and other retirement plans owned or payable to you.

- Name of plan
- Account number
- Type of plan]
- Account balance
- Beneficiary
- Most recent account statement