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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

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? _____
