

ESTATE PLANNING QUESTIONNAIRE

LAST NAME: _____

SPOUSE LAST NAME: _____

FIRST NAME: _____

SPOUSE FIRST NAME: _____

MIDDLE: _____

MIDDLE: _____

JR., SR. II, III, IV? _____

JR., SR. II, III, IV? _____

Name I prefer to be called: _____

Name I prefer to be called: _____

DATE OF BIRTH: _____

DATE OF BIRTH: _____

HOME ADDRESS _____

HOME CITY: _____ **HOME STATE:** _____ **HOME ZIP:** _____

COUNTY OF RESIDENCE: _____

HOME PHONE: _____

HUSBAND'S CELL PHONE: _____ **WIFE'S CELL PHONE:** _____

EMAIL: _____

Did anyone refer you to us? Yes ___ No ___

If yes, whom may we thank? _____

Would you like for this referral source to be copied on correspondence? Yes ___ No ___

Please provide us with copies of your existing Wills, Trust Agreement(s), Powers of Attorney, and Living Wills.

Other:

CHILDREN

of Grandkids

(1) _____ **AGE:** _____

address: _____

phone: _____

(2) _____ **AGE:** _____

address: _____

phone: _____

(3) _____ **AGE:** _____

address: _____

phone: _____

(4) _____ **AGE:** _____

address: _____

phone: _____

(5) _____ **AGE:** _____

address: _____

phone: _____

(6) _____ **AGE:** _____

address: _____

phone: _____

Is this the Husband and Wife's first marriage? ___Yes ___No (If not, indicate who is the parent of each child)

ASSET INFORMATION	VALUE	COMMENTS
Life Insurance on Husband	_____	_____
Life Insurance on Wife	_____	_____
Husband's IRAs, 401(k)'s, Profit Sharing, etc.	_____	_____
Wife's IRAs, 401(k)'s, Profit Sharing, etc.	_____	_____
Residence	_____	_____
Other Real Estate	_____	_____
Stocks, Bonds, Mutual Funds	_____	_____
Cash, CD's Savings, Checking	_____	_____
Notes Where People Owe You Money	_____	_____
Business Interests	_____	_____
Cars, Jewelry, Furniture, etc.	_____	_____
TOTAL ESTATE	=====	

Who do you want to name as **agent** on your business power of attorney (formally known as the **Statutory Durable Power of Attorney**)?

(Spouses normally name each other first.)

Husband

Wife

1. _____
2. _____
3. _____

1. _____
2. _____
3. _____

Who do you want to name as **agent** on your **medical power of attorney**?

(Spouses normally name each other first.)

Husband

Wife

1. _____
Address: _____

Phone: _____
2. _____
Address: _____

Phone: _____
3. _____
Address: _____

Phone: _____

1. _____
Address: _____

Phone: _____
2. _____
Address: _____

Phone: _____
3. _____
Address: _____

Phone: _____

