



Estate Planning Questionnaire

Date of Initial Consultation: _____ Forward Drafts by: Regular Mail _____ E-Mail _____ Pick Up _____

Address: _____

E-Mail Address: _____ Home Phone: _____

Information needed for Will:

Husband

Wife

Full Legal Names: _____

Name called: _____

Executor: _____

Relationship to you: _____

Address (City, State): _____

Alt. Executor: _____

Relationship to you: _____

Address (City, State): _____

2nd Alt Executor: _____

Relationship to you: _____

Address (City, State): _____

□ If you are appointing more than one person to serve at a time (Co-Executors), please choose one of the following options:

H W

They may act independently of one another.

They must act jointly and in concert with one another. In the event of a disagreement, the decision of _____, shall control.

□ If you have Minor Children, please complete the following sections pertaining to appointment of Trustee and Guardian:

Trustee: _____

Relationship to you: _____

Address (City, State): _____

Alt Trustee: _____

Relationship to you: _____

Address (City, State): _____

2nd Alt. Trustee: _____

Relationship to you: _____

Address (City, State): _____

□ If you are appointing more than one person to serve at a time (Co-Trustees), please choose one of the following options:

H W
____ ____
____ ____

They may act independently of one another.

They must act jointly and in concert with one another. In the event of a disagreement, the decision of _____, shall control.

Guardian: _____

Relationship to you: _____

Address (City, State): _____

Alt. Guardian: _____

Relationship to you: _____

Address (City, State): _____

2nd Alt. Guardian: _____

Relationship to you: _____

Address (City, State): _____

List any special circumstances whereby you would not want any of the above named fiduciaries to act on your behalf (i.e. separation or divorce): _____

Children (Full Names/Ages): _____

All parties named above are U.S. Citizens Yes No

Distribution of Tangible Personal Property (i.e. collectibles, jewelry, household items, automobiles, etc) (Check all that apply)

List any specific bequests: Include full legal name of person receiving bequest, their relationship to you, and their city and state of residence: (Example: I give all my jewelry to my daughter, JANE ANN DOE, of Raleigh, North Carolina.)

_____ I give all my tangible personal property (not specifically bequeathed) to my spouse; and if my spouse predeceases me, to my surviving children.

_____ I give all my tangible personal property (not specifically bequeathed) to my surviving children.

_____ I direct my Executor to sell my tangible personal property and add the proceeds of its sale to my Residuary Estate.

Asset Distribution (Gifts of Residuary Estate)

All to each other and then to issue per stirpes _____
Separate trusts for children _____
 Percentages and Ages for Distribution _____
Pot Trust for children _____
 Percentages and Ages for Distribution _____

Contingent Beneficiaries of Residuary Estate:

_____ Distribute according to the laws of intestacy.
_____ Distribute to the persons OR charitable organizations named below:
(Include Full Legal name, Relationship to you, and their City and State
of residence; If charity, please include full address.)

Tax planning:

Credit shelter trust:
 Spouse only _____
 Sprinkle (Spouse and kids) _____
 Age for distribution to kids _____
Balance:
 Outright to spouse _____
 Q-Tip _____

Special instructions: _____

Estimated Estate Value

	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
Real Estate:	_____	_____	_____
Bank Accounts	_____	_____	_____
Money Markets	_____	_____	_____
Cash:	_____	_____	_____
Stocks/Bonds:	_____	_____	_____
Life Insurance:	_____	_____	_____
Cars/Boats:	_____	_____	_____
Personal Property: Jewelry/Art/Guns/ Stamps/Coins:	_____	_____	_____
Retirement:	_____	_____	_____
<u>Total</u> <u>Estimated Value:</u>	_____	_____	_____
<u>Taxable Estate</u>	_____		
<u>Non-Taxable Estate</u>	_____		