



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:

Client

Full Legal Name: _____

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:

_____ 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:

- 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 surviving children.

_____ I give all my tangible personal property (not specifically bequeathed) to the following named person(s):

_____ 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)

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:
Sprinkle (kids) _____
Age for distribution to kids _____

Balance:
Q-Tip _____

Special instructions: _____

Estimated Estate Value

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>	_____

Taxable Estate _____

Non-Taxable Estate _____