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ESTATE PLANNING QUESTIONNAIRE

Client:

Name: _____ DOB: _____ SSN: _____

Address: _____

Spouse:

Name: _____ DOB: _____ SSN: _____

Address: _____

Legally Married: _____ Both U.S. Citizens? _____

Children:

Name: _____ DOB: _____ SSN: _____

Address: _____

Name: _____ DOB: _____ SSN: _____

Address: _____

Name: _____ DOB: _____ SSN: _____

Address: _____

Name: _____ DOB: _____ SSN: _____

Address: _____

Name: _____ DOB: _____ SSN: _____

Address: _____

Name: _____ DOB: _____ SSN: _____

Address: _____

Personal Representative: (Who you would like to administer your estate)

First Choice: _____

Second Choice: _____

Guardian: (Who you would like to take care of your minor children upon your death)

First Choice: _____

Second Choice: _____

Estate:

Real Estate:

<u>Location</u>	<u>Type of Property</u>	<u>Type of Joint-Ownership</u>
1. _____		
2. _____		
3. _____		
4. _____		

Life Insurance:

<u>Named Insured</u>	<u>Insurance Company</u>	<u>Beneficiary</u>
1. _____		
2. _____		
3. _____		

Bank Accounts, Money Market Accounts, CDs, etc.:

<u>Bank/Credit Union</u>	<u>Type of Account</u>	<u>Joint Ownership</u>	<u>Pay-on-death Beneficiary</u>
1. _____			
2. _____			
3. _____			
4. _____			
5. _____			
6. _____			

Retirement, IRAs, Stocks, Bonds, etc.:

<u>Name of Account/Holding Institution</u>	<u>Names on accounts</u>	<u>Pay-on-death Beneficiary</u>
1. _____		
2. _____		
3. _____		
4. _____		
5. _____		

Titled Property (car, airplane, boat, etc.):

<u>Type of Property</u>	<u>Year</u>	<u>Value</u>	<u>Names of Owners</u>
1. _____			
2. _____			
3. _____			
4. _____			
5. _____			

LIVING TRUST

A living trust is a present transfer of property to trustees to manage for the benefit of beneficiaries.

What property may you want to transfer?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Who would be good trustees?

1. _____
2. _____
3. _____
4. _____

Who would be the beneficiaries?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

- Discussed taxes
- Discussed beneficiaries and P.O.D.'s
- Outside transfers part of estate
- Discussed Living Will
- Discussed Medical Power of Attorney
- Discussed Financial Power of Attorney
- Discussed specific bequests
- Discussed community property states