

# **ESTATE PLANNING QUESTIONNAIRE**

1. First client's full name: \_\_\_\_\_ SSN: \_\_\_\_\_

2. Other names used: \_\_\_\_\_

3. Home Tel. No.: \_\_\_\_\_ Other Tel. No.: \_\_\_\_\_

4. Second client's full name: \_\_\_\_\_ SSN: \_\_\_\_\_

5. Second client's other names used: \_\_\_\_\_ Tel. No.: \_\_\_\_\_

6. Address: \_\_\_\_\_

7. Date of birth: \_\_\_\_\_ Citizenship \_\_\_\_\_

8. Second client's date of birth: \_\_\_\_\_ Citizenship \_\_\_\_\_

9. Marital Status: (Date and place) \_\_\_\_\_

10. Prior marriage(s), date, how and when terminated: \_\_\_\_\_

\_\_\_\_\_

11. Names of children of present marriage, with age, residence and marital status:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

12. Names of children of prior marriage(s), with age, residence and marital status:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

13. Names of grandchildren (if applicable): \_\_\_\_\_

\_\_\_\_\_

14. Children or grandchildren with disabilities, and description of such disability.

\_\_\_\_\_

\_\_\_\_\_

15. Names of adopted children (if applicable): \_\_\_\_\_

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**16. Real estate, with location, general description, estimated value, mortgage(s), and how and when acquired:**

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**17. Life Insurance policies:**

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**18. Retirement plans:**

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**19. Bank and savings accounts: Joint, Trust etc.** \_\_\_\_\_

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**20. Other assets:**

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**21. Any existing wills: \_\_\_\_\_ Where located \_\_\_\_\_**

**22. Names and relationship of other relatives to be included in estate planning:**

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**23. Distribution plans for estate: (To spouse, children, other relatives)**

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**24. Executor(s) and alternate(s)**

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

**25. Trustee(s) and alternate(s)**

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

**26. Guardian(s) of minor children and alternate(s):**

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

**27. Other information:** \_\_\_\_\_

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