

**ESTATE PLANNING QUESTIONNAIRE**

**PERSONAL INFORMATION**

<b>NAME</b>	<b>ADDRESS</b>
<b>TELEPHONE</b>	<b>EMAIL</b>
<b>BIRTH DATE</b>	<b>US CITIZEN?</b>
<b>OCCUPATION</b>	<b>ANNUAL INCOME</b>
<p><b>MARITAL STATUS</b> <i>Please include date of marriage.</i></p> <p><i>Do you have a prenuptial agreement? Y / N. Please also indicate any previous marriages, and whether ended in death or divorce.</i></p>	

**WHAT ASSETS DO YOU OWN?** *Please give "ballpark" values. Please indicate financial institution, but no need for acct no.*

<b>RETIREMENT ACCOUNTS</b>	<i>Who is the beneficiary?</i>
<b>LIFE INSURANCE</b>	<i>On whose life?</i>
	<i>Who is the beneficiary?</i>
<b>REAL ESTATE</b>	<i>Coop? Condo?</i>
	<i>Owned Jointly? In Corporation? In Trust?</i>
<b>CASH ACCOUNTS</b>	<i>Owned Jointly? In Corporation? In Trust?</i>
<b>OTHER INVESTMENTS</b>	<i>Owned Jointly? In Corporation? In Trust?</i>
<b>BUSINESSES / INTELLECTUAL PROPERTY</b>	<i>Owned Jointly? In Corporation? In Trust?</i>

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**WHO ARE YOUR CLOSEST LIVING RELATIVES?**

*Please include people from whom you are estranged. Too complicated to describe here? We'll discuss in person.*

<b>SPOUSE</b>
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<b>CHILDREN</b> <i>Include those adopted or born out of wedlock.</i>
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<b>PARENTS</b> <i>Include adoptive parents, but not stepparents.</i>
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<b>SIBLINGS</b> <i>Include half-siblings, but not step-siblings.</i>
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**WHO SHOULD HANDLE YOUR AFFAIRS?** *Please provide all contact information, either here, or in separate page or email.*

<b>EXECUTOR</b> <i>In charge of settling your estate after your death.</i> <i>Primary: _____ Alternate(s): _____</i>
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<b>POWER OF ATTORNEY</b> <i>Able to handle your personal business during your life in the event of incapacity or other circumstances.</i> <i>Primary: _____ Alternate(s): _____</i>
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<b>HEALTH CARE PROXY</b> <i>Makes medical decisions for you if you are unable to make them for yourself.</i> <i>Primary: _____ Alternate(s): _____</i>
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<b>GUARDIAN</b> <i>Would have custody of your children if you are deceased or incapacitated.</i> <i>Primary: _____ Alternate(s): _____</i>
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**WHO WOULD YOU LIKE TO RECEIVE YOUR ESTATE?** *Note that the disposition of specific items of personal property, and electronic files, can be directed in a separate memorandum, rather than in your will.*

NAME	Current Age	Relation to you	Specific Asset?	Gift to be held in trust?

<b>DO YOU HAVE ANY HEALTH ISSUES?</b>
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<b>FUNERAL / BURIAL WISHES:</b>
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<b>SPECIAL CIRCUMSTANCES OR CONCERNS?</b>
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