

ESTATE PLANNING & WILLS

We know your family is the most important thing to you and that your primary concern is to provide for your family's future. Wherever you are in your life or career, it's never too early or late to start planning for the future. Having an estate plan will ensure the fair and equitable division of your assets according to your wishes.

ESTATE PLANNING QUESTIONNAIRE

DATE: _____

Full Legal Name: _____
(as it appears on Social Security card)

Social Security Number: _____

Age: _____ Date of Birth: _____

Other Names Used: _____

Occupation (or, if retired, former occupation): _____

PERSONAL INFORMATION

Physical Address: _____

Mailing Address: _____

County Residence Located: _____

Home Phone: _____ Cell Phone: _____

Business Phone: _____ E-mail Address: _____

CHILDREN

Full Name of Children (<i>if applicable</i>) Addresses and Phone Numbers	Birth Date and Age	Marital Status	Number of Children

1. Are all of the above persons U.S. Citizens? _____
2. Do any of your children or grand-children require special attention? _____

3. Are there any persons other than minor children dependent upon you? _____
4. Does any family member receive Social Security or other benefits? _____
5. Do you presently have a Living Trust? _____ Ever file a Federal Gift Tax Return? _____

EXECUTOR/EXECUTRIX

	Name and Address	Phone Number	Relationship to Client
Executor/Executrix		Home: Business: Cell:	
Alternate Executor/ Executrix		Home: Business: Cell:	
Second Alternate Executor/Executrix		Home: Business: Cell:	

POWER OF ATTORNEY

	Name and Address	Phone Number	Relationship to Client
Attorney-in-fact		Home: Business: Cell:	
Alternate Attorney-in- Fact		Home: Business: Cell:	
Second Alternate Attorney-in-fact		Homes: Business: Cell:	

HEALTH CARE POWER OF ATTORNEY

	Name and Address	Phone Number	Relationship to Client
Health Care Agent		Home: Business: Cell:	
Alternate Health Care Agent		Home: Business: Cell:	
Second Alternate Health Care Agent		Home: Business: Cell:	

LIST OF ASSETS

Address of Real Property	Acreage	Value

Checking and Savings Accounts (Name of Bank)	Type of Account	Value

Certificates of Deposit (Name of Bank)	Value

Stocks (List name of company)	Number of Shares	Type of Stock	Value

Bonds (List name of Company)	Type of Bond	Value

Automobiles (List Make and Model)	Value

Valuable Personal Property (Description)	Value

Other Miscellaneous Household Contents (Description)	Value

Please list any additional assets, such as Insurance, Pension & Profit Sharing and IRA's (if applicable):
