

# CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

Date: \_\_\_\_\_ Referred by: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: Home \_\_\_\_\_ Work \_\_\_\_\_ Cell \_\_\_\_\_ Fax \_\_\_\_\_

Email: Personal \_\_\_\_\_ Work \_\_\_\_\_

Occupation: \_\_\_\_\_ Resided in Florida since \_\_\_\_ Age \_\_\_\_\_

Have you ever made a will or a trust? \_\_\_\_\_ Safe deposit box is at \_\_\_\_\_ Bank  
(If so, please bring it in)

Citizen of U.S. \_\_\_\_; Other: \_\_\_\_\_ Accountant: \_\_\_\_\_

Life Insurance Agent: \_\_\_\_\_ Stock Broker: \_\_\_\_\_

**FAMILY INFORMATION**                      Name                                      Address                                      Phone                                      Age

Spouse

Children

Spouse's Children

Parents

Spouse's Parents

Brothers & Sisters

Spouse's Brothers  
& Sisters

Persons Not Listed Above  
To Whom You Want To Leave Something

**NOTE:** We will discuss all of the following questions in more detail. Please answer as best as you can for now.

**REPRESENTATIVE INFORMATION**

Who do you want to act for you in case of your death or incapacity? Please list alternates.

**ASSET INFORMATION**

(Just estimate values)

	<u>Your Name Alone</u>	<u>Joint with Spouse</u>	<u>Spouse's Name Alone</u>
Life Insurance	\$	\$	\$
Home			
Other Real Estate			
Stocks, Bonds, Etc.			
Bank, Savings, CD's, Money Markets, Etc.			
IRA's, Retirement Accts, Etc.			
Furnishings, Jewelry, Autos, & Tangible Property			
Inheritances Expected			
Other Assets			
<b>Totals</b>			

## WILL AND TRUST DISPOSITIVE INFORMATION

(Please list to whom you want to leave your assets at your death. Please list alternates to receive each gift in case the person you name dies before you.)

### Special gifts of jewelry, furnishings, autos, collections and other tangible property:

(Please state whether the cost of delivery should be paid by the estate or by the beneficiary)

### Gift of all remaining tangible property:

### Gift of homestead:

### Special gifts of cash, stock or other specific items:

### Gift of all remaining assets (residue):

## TRUSTS FOR MINORS OR OTHERS

List anyone (such as minor children) for whom you want assets held in trust instead of being distributed to them at your death, so that the trustee invests and distributes the assets on a certain schedule until the beneficiaries can do so alone?

Who do you want to be the **trustee** (may be bank or individual)?

(Please list alternates)

List at what age you want the beneficiary to begin directly receiving **income** from the trust (e.g, age 21):

List at what age(s) you want the beneficiary to receive the **principal** (e.g., in thirds at ages 25, 30 and 35):

## ESTATE PLANNING DOCUMENTS

In addition to discussing your **last will and testament**...

Do you want to discuss the effect of holding assets in **joint names or "in trust for"** with others?

Yes       No

Do you want to discuss setting up a **living trust**?

Yes       No

Do you want to discuss giving someone your **durable power of attorney** to handle your financial affairs and bill paying?

Yes       No

Do you want to discuss signing a **living will** to express your desires concerning the use or non-use of medical procedures to prolong your life in case of terminal illness?

Yes       No

Do you want to discuss signing a **designation of health care surrogate** to give someone power to make medical decisions for you if you are unable to do so?

Yes       No

Do you want to discuss signing a **declaration of preneed guardian** in case a court finds you or your minor child incapacitated?

Yes       No

Do you want to discuss anything else? Please list:

Return to:  
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