

LAW OFFICE OF
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CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

Date: _____ Referred by: _____

Name: _____

Address: _____

Phone: Home _____ Work _____ Cell _____ Fax _____

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

(Please list who you would want to serve in the following cases. Please include **alternates** to serve in case the one you name does not.)

In case of your **incapacity**, who would you want to take care of your...

- **Financial** decisions and bill paying:
- **Health** decisions:

At your **death**, who do you want to take care of...

- Administering your estate (**personal representative**):
- Your minor children's financial affairs (**guardian of property**):
- Your minor children's medical/personal decisions (**guardian of person**):

ASSET INFORMATION

(Just estimated 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, Pensions, Etc.			
Furnishings, Jewelry, Autos, & Tangible Property			
Inheritances Expected			
Other Assets			

Totals

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:

Special gifts of cash, stock or other specific items:

Gift of all remaining assets (residue):

ESTATE TAXES (Generally, there is no federal estate tax for assets less than \$675,000)

From whose share of the will do you want estate taxes paid?

_____ Each gift pays its own share.

_____ All taxes are paid from the residue.

_____ Other:_____

Who do you want to pay estate taxes on property passing outside probate (not under the will)?

_____ The person who receives the property.

_____ The residue of the will.

_____ Other:_____

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: