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ESTATE PLANNING QUESTIONNAIRE

FOR MEETING WITH DIANE A. WALLIS ON _____ at _____

Completing this Questionnaire will help you organize the information you need at your fingertips to plan your estate. It will save us time and assure that we do not overlook some important item. Please complete *as much as you can* and bring it with you to your Estate Planning Conference. The charge will be \$200.00 per hour for this conference and subsequent estate planning. At the time we meet you will receive information on the documents you need for your particular situation.

I. BASIC PERSONAL DATA

Name _____

Address _____ Zip: _____

Home Phone # _____ Your Work Phone # _____

Date of Birth _____ Place of Birth _____

Citizenship: _____ Social Security # _____

Spouse's Name _____

Date of Birth _____ Place of Birth _____

Citizenship: _____ Social Security # _____

Spouse's Work Phone # _____

Children

Please note if any children listed are adopted, are stepchildren of one of you, or are disabled or otherwise in need of special attention.

1. Child's name _____ Date of birth _____
Address (if different from above) _____

Occupation _____ Spouse's name _____

Child's Children (names, sex and ages): _____

2. Child's name _____ Date of birth _____
Address (if different from above) _____

Occupation _____ Spouse's name _____

Child's Children (names, sex and ages): _____

3. Child's name _____ Date of birth _____
Address (if different from above) _____

Occupation _____ Spouse's name _____

Child's Children (names, sex and ages): _____

4. Child's name _____ Date of birth _____
Address (if different from above) _____

Occupation _____ Spouse's name _____

Child's Children (names, sex and ages): _____

Add a separate sheet if needed for additional children.

Are there any family members that are now or might later be dependent on you for care or support, might leave you a substantial bequest, or whom you wish to name as a beneficiary in your will. If so, list on a separate sheet the name, address and particulars.

II. DISPOSITION AND SPECIAL CONCERNS

1. Please begin by listing briefly your goals, both for our meeting and for the estate planning process overall.

2. Please state briefly how you each want to dispose of your estate: the names of the beneficiaries and the amounts or percentage of your estate and the names of any alternate beneficiaries who will take in the event that your primary beneficiary dies before you.

3. Do you have any specific items of property or sum of money you wish to leave to specific persons? If so, describe the items and give the name of the person and any alternate beneficiary.

4. If you have young children, you should name one or more guardians and/or alternate guardians who would care for your minor children if you are not survived by your spouse. Please talk to the prospective guardians to make sure they are willing to be guardians. Being a guardian is a big job. In effect the guardian takes over all the duties of a parent. Also, if you have young children, you should name a Trustee to handle their financial affairs should the children outlive both parents. The Trustee can be the same or a different person from the Guardian.

Guardian _____

Address _____

Alternate Guardian _____

Address _____

Trustee _____

Address _____

Alternate Trustee _____

Address _____

5. You should also name an Executor to settle your estate, usually your spouse, and then another as an alternate.

Executor _____

Address _____

Alternate Executor _____

Address _____

6. Do you have other special concerns or questions? If so, please write them down so that we will be sure to discuss them.

III. ASSETS AND DEBTS

We should review your assets and debts to determine whether there are possible tax consequences to be avoided, identify types of properties that need special treatment to transfer ownership or discuss any items that you wish to bequeath to a particular person. Please list on a separate sheet any of the following which you own.

1. **Bank Accounts**
List each account, the average or approximate balance, and the exact manner in which the account is titled (in your name alone or jointly with another).

2. **Stocks and Bonds**
For each group of stocks and bonds, estimate the fair market value and note the exact way in which the security is registered (your name alone or jointly with another).

3. **Real Estate**
Identify each parcel of real estate you own, including your residence, list its fair market value, the amount of any mortgage, and the exact names of the owners of the property.

4. **Life Insurance**
List the face amount of each life insurance policy you own, the beneficiary, and the amount of any loan on the policy.
5. **Business Interests**
List any interest you may own in a business and estimate its fair market value.
6. **Vehicles and Other Valuable Personal Property**
List each vehicle, the fair market value, and indebtedness. Also list any boats, trailers, coin collections, guns, family heirlooms, or any other items of valuable personal property and give your opinion as to their fair market value.
7. **Estates, Trusts, etc.**
Are you the beneficiary of an estate or trust, or do you have a right under a trust to require the payment of any money to yourself or anyone else? Give details.
8. **Miscellaneous**
 - (a) Retirement Plan
If you are a member of a pension or profit-sharing plan, describe the benefits you or your survivors will receive.
 - (b) Safe Deposit Box
If you have one, is it jointly held?
 - (c) **Your Present Will**
Please bring it with you.
 - (d) Other Assets
Did I miss something? List anything else of value you have and the approximate value.