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List of Things to Bring

- 1) Last year's IRS Form 1040
- 2) Copy of any current Wills and/or Trusts and/or Marital Agreements (if applicable)
- 3) Personal Financial Statement, (or general list of assets and liabilities included in the estate planning questionnaire)
- 4) Copy of Real Estate Warranty Deeds

PLEASE PROVIDE ME WITH A COPY OF YOUR CURRENT WILL, ANY TRUSTS, AND/OR MARITAL AGREEMENTS, IF YOU HAVE ANY OF THESE DOCUMENTS.

ESTATE PLANNING QUESTIONNAIRE

PERSONAL INFORMATION:

Name:

_____ (First) (Middle) (Last)

Home Address:

_____ (Street) (City) (State) (Zip) (County)

Home Telephone:

Cell Number:

e-mail address

(To be used for confidential information)

Additional Information:

Date of Birth:

Citizenship:

Social Security No.:

Business Telephone:

If you were referred to me, I would like to thank them:

_____ Name & Firm or Company

DISPOSITION OF PROPERTY:

Describe in your own words how you would like your property distributed upon your death.

PRIOR MARRIAGES (if any):

If you have been married before, please furnish the following information as to each prior marriage below:

Name of Former Spouse:

_____ (First) (Middle)(Last)

Date of Marriage: _____ Date of termination of Marriage: _____

Cause of termination of Marriage: Death Divorce or Annulment (Circle One)

CHILDREN:

Name: _____ Date of Birth: _____
(First) (Middle) (Last)

Present Address, if different from yours: _____ Phone No. _____
(Street) (City) (State) (Zip)

Name: _____ Date of Birth: _____
(First) (Middle) (Last)

Present Address, if different from yours: _____ Phone No. _____
(Street) (City) (State) (Zip)

Name: _____ Date of Birth: _____
(First) (Middle) (Last)

Present Address, if different from yours: _____ Phone No. _____
(Street) (City) (State) (Zip)

Name: _____ Date of Birth: _____
(First) (Middle) (Last)

Present Address, if different from yours: _____ Phone No. _____
(Street) (City) (State) (Zip)

EXECUTORS, TRUSTEES AND GUARDIANS:

EXECUTOR(S): (Person who pays debts, files tax returns & liquidates certain assets)

Address: _____ Phone No. _____

Relationship: _____

1st Alternate Executor(s):

Address: _____ Phone No. _____

Relationship: _____

2nd Alternate Executor(s):

Address: _____ Phone No. _____

Relationship to: _____

TRUSTEE(S): (Person who invests & distributes money and other assets)

Address: _____ Phone No. _____

Relationship: _____

1st Alternate Trustee:

Address: _____ Phone No. _____

Relationship: _____

2nd Alternate Trustee:

Address: _____ Phone No. _____

Relationship: _____

GUARDIAN: (Person who raises any minor child(ren))

Address: _____ Phone No. _____

Relationship: _____

1st Alternate Guardian:

Address: _____ Phone No. _____

Relationship: _____

2nd Alternate Guardian:

Address: _____ Phone No. _____

Relationship: _____

<i>Other</i> Please use these descriptions in the TYPE column for your Other assets.		
	Collectibles Household & Personal Effects	Vehicles Miscellaneous
<i>TYPE</i>	<i>ASSET VALUE</i>	

<i>Liability</i> Please use these descriptions in the TYPE column for your Liability assets.		
	Mortgage	Personal Loan Other Loan
<i>TYPE</i>	<i>ASSET VALUE</i>	<i>AMOUNT OWED</i>

<i>Insurance</i> Please use these descriptions in the TYPE column for your Insurance assets.				
	Individual Term (T)	Whole Life (WL)	Universal Life (UL)	
		Group Term (GpT)	Variable Life (VL)	
<i>TYPE</i>	<i>OWNER</i>	<i>BENEFICIARIES</i>	<i>CASH VALUE</i>	<i>Death Benefit</i>

