

ESTATE PLANNING QUESTIONNAIRE



Betts

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ESTATE PLANNING

Date: _____

Family Information:

Full Name: _____

Citizenship: _____

Social Security No.: _____

Date of Birth: _____

Home Address: _____

City, State, Zip Code: _____

Home Telephone: _____

Cell Phone: _____

E-mail: _____

Employer: _____

Office Address: _____

City, State, Zip Code: _____

Office Telephone: _____

Father's Name (if living): _____

City, State: _____

Mother's Name (if living): _____

City, State: _____

Estimated size of any potential inheritance: _____

Names of Prior Spouses (if any): _____

Dependants other than Children (if any): _____

Your Children:

Name	Birthdate	Social Security Number	Adopted? Mark "A"	Married Yes / No	No. of Children
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Accountant (if any):

Name and Company: _____

Address: _____

Phone: _____

Financial Advisor (if any):

Name and Company: _____

Address: _____

Phone: _____

Life Insurance:

Number of Policies: _____

Total Face Amount: _____

Total Present Cash Value: _____

Owner of Policies: _____

Total Loan Against Policies: _____

Primary Beneficiaries:

Contingent Beneficiaries:

Retirement Benefits:

Employer Plans

Type (pension, profit sharing,
ESOP, etc.):

Balances:

Primary Beneficiaries:

Contingent Beneficiaries:

IRA Balance

Primary Beneficiaries:

Contingent Beneficiaries:

Assets (attach separate sheet if necessary):

	Total Value		Less Liability		Equity
Primary Home:	\$ _____	-	_____	= \$	_____
Secondary Home:	\$ _____	-	_____	= \$	_____
Recreational Vehicles:	\$ _____	-	_____	= \$	_____
<u>Other Real Estate:</u>					
(Description & Location)					
_____	\$ _____	-	_____	= \$	_____
_____	\$ _____	-	_____	= \$	_____
_____	\$ _____	-	_____	= \$	_____

Business Interests:

Closely-Held Corporate Stock:

1. _____ Stock Value \$ _____
(Company Name)
2. _____ Stock Value \$ _____
(Company Name)

Partnerships:

1. _____ Value \$ _____
(Partnership Name)
2. _____ Value \$ _____
(Partnership Name)

Sole Proprietorship:

_____ Value \$ _____
(Trade Name)

	Complete Names and Status Shown on Title Documents	Approximate Value
Cash or Cash Equivalents	_____	\$ _____
Traded Stock	_____	\$ _____
Bonds	_____	\$ _____
Receivables from Others	_____	\$ _____
Real Estate Contracts	_____	\$ _____
Loans to Children	_____	\$ _____
Investment Partnerships	_____	\$ _____
Autos, Boats, Furnishings, Jewelry	_____	\$ _____
Burial Plot	_____	Value \$ _____
Other Assets	_____	Value \$ _____
	_____	Value \$ _____

Debts and Liabilities (excluding Real Estate debts described above):

	Creditor	Brief Description	Total Owed
1.	_____	_____	\$ _____
2.	_____	_____	\$ _____
3.	_____	_____	\$ _____
4.	_____	_____	\$ _____
5.	_____	_____	\$ _____
		Total Debts and Liabilities	\$ _____
		TOTAL (assets less liabilities)	\$ _____

Background Questions:

Yes / No

1. Have you ever signed a Community Property Agreement or Prenuptial Agreement? _____
2. Are you a beneficiary or trustee of any trust? _____
3. Have you ever made gifts over \$17,000.00? _____
4. Have you ever filed any gift tax return? _____
5. Do you suffer from any serious illness or incapacity? _____
6. Do any of your children suffer from any serious illness or incapacity? _____
7. Are you subject to any divorce or other court decree or agreement limiting your estate planning choices? _____
8. Are you a party to any buy-sell agreement? _____
9. Do you have a safe deposit box? If so, then where is it located, what is the box number and who is the additional signer? _____

Documents to Bring with You:

1. Existing Wills or Trust.
2. Any Community Property Agreements.
3. Any divorce decree or agreement referred to in Item 7 above.
4. Any buy-sell agreement referred to Item 8 above.

Tentative Will Provisions:

1. Personal Representative (administers Will during probate)
First Choice: _____ Relationship: _____
Address: _____
Second Choice: _____ Relationship: _____
Address: _____
Third Choice: _____ Relationship: _____
Address: _____

2. Guardian of Minors (raises children who are not yet 18)
First Choice: _____ Relationship: _____
Address: _____
Second Choice: _____ Relationship: _____
Address: _____
Third Choice: _____ Relationship: _____
Address: _____

3. Trustee (manages estate for the benefit of beneficiaries)
First Choice: _____ Relationship: _____
Address: _____
Second Choice: _____ Relationship: _____
Address: _____
Third Choice: _____ Relationship: _____
Address: _____

4. Distribution of Trust Estate
a. Age of youngest child before distribution: _____
b. Distribution:
(1) Age for first portion: _____ Percentage/Amount _____
(2) Age for second portion: _____ Percentage/Amount _____
(3) Age for third portion: _____ Percentage/Amount _____

5. Durable Power of Attorney for Financial
First Choice: _____ Relationship: _____
Second Choice: _____ Relationship: _____
Third Choice: _____ Relationship: _____

6. Durable Power of Attorney for Health Care
First Choice: _____ Relationship: _____
Second Choice: _____ Relationship: _____
Third Choice: _____ Relationship: _____

