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**Estate Planning Questionnaire
Individual**

Date: _____

Name: _____

Home Address:

Municipality: _____

County: _____

Home Phone: _____

Email: _____

Business/Employer:

Work Address:

Office Phone: _____

Citizenship: _____

Soc Sec Number: _____

Date of Birth: _____

Education:

Prior Marriage(s):

Children and Other Dependents

Name Relationship Date of Birth

Special Considerations Affecting any Child or Other Dependent

Assets
Approximate Values

	Individual	Joint (with other party)
Real Estate:		
Home Less Mortgage		
Other Less Mortgage		
Tangible Personal Property:		
Items of Unusual Value		
Liquid Assets:		
Bank Account, Cash and Money Market Funds		
Stocks, Bonds and Mutual Funds		
Life Insurance on Life of:		
Business Interests:		
Other:		
Employee/Retirement Benefits:		
IRAs		
401(k)		
TIAA/CREF		
Other		
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Totals		

Life Insurance Detail

Company	Face Amount	Term or Whole Life	Person Insured	Owner	Beneficiary
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Employee/Retirement Benefits Detail

Account	Value	Owner	Primary Beneficiary	Alternate Beneficiary
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**Interests in Estates or Trusts
and
Potential Future Inheritances**

Liabilities
(other than mortgages)

Other Advisors
(investment advisors, tax accountants, etc.)

Name	Type	Firm/Address

Other Persons to be Named in Estate Plan

Name	Relationship	Address

Digital Assets

Consider making an inventory of digital assets (online accounts) and associated usernames and passwords.

Documents Essential for Review

Please furnish, where relevant, copies of:

- Existing wills, trust agreements, powers of attorney and living wills
- Pre-nuptial agreements or divorce settlement agreements
- Wills or trusts created by others in which you have an interest
- Any prior Federal gift tax returns filed
- Partnership agreements, shareholder or buy-sell agreements for any closely-held business interests

Estate Planning Issues to Consider

Are trusts needed for minor children? At what age or ages should children receive substantial assets outright? All at once? Gradually at different ages?

Who should be Guardians of the Persons to supervise the upbringing of minor children?

Who should be Executor (to settle the estate) or Trustee (to administer ongoing trusts)? What individual or combination of individuals? Should a bank be considered for these duties?

Who should inherit if you are not survived by descendants?

Do you want durable general and health care powers of attorney to appoint someone to act on your behalf in case of disability?

Do you want a living will to express your views about heroic medical measures?

Do you want to leave a letter or memorandum of instructions to family about funeral, cremation or burial arrangements? Such instructions are best made outside of a will, which would not be probated until after the funeral has taken place.