



NESBITT LAW  
— PLLC —

ESTATE PLANNING QUESTIONNAIRE

PERSONAL INFORMATION:

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Citizenship: \_\_\_\_\_

Home Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_ Telephone No.: \_\_\_\_\_

Occupation: \_\_\_\_\_

Name of Employer: \_\_\_\_\_

Business Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_ Telephone No.: \_\_\_\_\_

BENEFICIARIES:

<u>Name</u>	<u>Relationship</u>	<u>Date of Birth</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**ASSETS AND LIABILITIES:**  
(Rounded to nearest thousands)

<u>Assets</u>	<u>Total Value</u>
Cash (bank accounts, certificates of deposit)	\$ _____
Marketable securities (stocks and bonds)	\$ _____
Notes and receivables (money owed to you)	\$ _____
Businesses you own	\$ _____
Home (list mortgage below)	\$ _____
Other real estate (list mortgages below)	\$ _____
Insurance (face amount)	\$ _____
Retirement plans (death benefits)	\$ _____
Furniture and furnishings	\$ _____
Other personal property (cars, jewelry, etc.)	\$ _____
Other assets (not described above)	\$ _____
<b>TOTAL ASSETS</b>	\$ _____



**DEATH BENEFITS:**

(Life insurance and retirement plans)

<u>Name of Policy or Plan<sup>1</sup></u>	<u>Death Benefit</u>	<u>Present Value<sup>2</sup></u>	<u>Beneficiary</u>
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____

<sup>1</sup> For life insurance policies, give the name of the insurance company, the policy number, and the type of insurance (i.e., term, whole life, universal life, etc.). For retirement plans and other employment benefits, give the name of the plan and the type of plan (i.e., qualified pension plan, qualified profit-sharing plan, nonqualified pension plan, stock option plan, etc.).

<sup>2</sup> For life insurance policies, give the present cash surrender value of the policy, if known. For many retirement plans, the value of the death benefit may be the same as the present value of accrued benefits.

**OTHER INFORMATION:**

1. Please supply copies of your present wills, any trusts you have created (revocable or irrevocable), any declarations regarding medical treatment (living wills), and any “durable” powers of attorney.
2. If you have ever filed any gift tax returns, please supply copies of those returns.
3. If you hold any accounts or own any property jointly with anyone, please describe the property, the nature of your interest, and the names of the co- owners.

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4. If you own a business (and for each business you own), respond to questions 5-6:
5. If your business is a partnership, what is your interest and who are the other partners? If it is a corporation, how much and what kind of stock is outstanding and who owns it (and in what amounts)?

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6. If there is a partnership or shareholder agreement, please supply a copy of the agreement.
7. If you have a written employment agreement with any corporation, please supply a copy of the agreement.

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8. Are you entitled to receive the income or principal from any existing trust or estate?  
Please describe your interest:

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9. Do you expect to inherit any property from anyone else?

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10. If you have been married before, please provide the name of your previous husband or wife and the date of the death or divorce:

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11. If you are obliged to provide in your will for, or support during your lifetime, your former husband or wife or any children from a previous marriage, please supply a copy of your divorce agreement or decree.

12. Are you under any other obligation to leave any part of your estate to any particular person or in any particular way?

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13. Please supply the names and addresses of your accountant, insurance agent, and any other tax or investment advisors.

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