



NESBITT LAW
— PLLC —

ESTATE PLANNING QUESTIONNAIRE

PERSONAL AND FAMILY INFORMATION:

Spouse #1 Name: _____

Date of Birth: _____ Citizenship: _____

Home Address: _____

City, State, Zip: _____ Telephone No.: _____

Spouse #1 Occupation: _____

Name of Employer: _____

Business Address: _____

City, State, Zip: _____ Telephone No.: _____

Spouse #2 Name: _____

Date of Birth: _____ Citizenship: _____

Home Address: _____

City, State, Zip: _____ Telephone No.: _____

Spouse #2 Occupation: _____

Name of Employer: _____

Business Address: _____

City, State, Zip: _____ Telephone No.: _____

CHILDREN OR OTHER BENEFICIARIES:

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

ASSETS AND LIABILITIES:
(Rounded to nearest thousands)

<u>Assets</u>	<u>Total Values Owned By</u>		
	Spouse #1	Spouse #2	Jointly
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 on Spouse #1 life (face amount)	\$ _____	\$ _____	\$ _____
Insurance on Spouse #2 life (face amount)	\$ _____	\$ _____	\$ _____
Retirement plans (death benefits)	\$ _____	\$ _____	\$ _____
Furniture and furnishings	\$ _____	\$ _____	\$ _____
Other personal property (cars, jewelry, etc.)	\$ _____	\$ _____	\$ _____
Other assets (not described above)	\$ _____	\$ _____	\$ _____
<i>TOTAL ASSETS</i>	\$ _____	\$ _____	\$ _____

Liabilities

Total Amounts Owed By

	Spouse #1	Spouse #2	Jointly
Mortgage on home	\$ _____	\$ _____	\$ _____
Mortgage on other real property	\$ _____	\$ _____	\$ _____
Loans against life insurance	\$ _____	\$ _____	\$ _____
Other debts	\$ _____	\$ _____	\$ _____
<i>TOTAL LIABILITIES</i>	\$ _____	\$ _____	\$ _____
Net Worth	\$ _____	\$ _____	\$ _____
Combined Net Worth			\$ _____

NOTES ON ASSETS AND LIABILITIES:

DEATH BENEFITS:

(Life insurance and retirement plans)

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

¹ 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.).

² 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:

(These questions apply to both Spouse #1 and Spouse #2.)

- 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 other than your Spouse #1 or Spouse #2, please describe the property, the nature of your interest, and the names of the co- owners:

- 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)?

- 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.

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

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

10. If you have been married before, please provide the name of your previous Spouse #1 or Spouse #2 and the date of the death or divorce:

11. If you are obliged to provide in your will for, or support during your lifetime, your former Spouse #1 or Spouse #2 or any children from a previous marriage, please supply a copy of your divorce agreement or decree.

12. If you have signed a premarital agreement, please supply a copy.

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

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

ADDITIONAL NOTES:



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QUESTIONNAIRE FOR PREPARATION
OF WILLS, DURABLE POWERS OF ATTORNEY,
HEALTH CARE POWERS OF ATTORNEY AND LIVING WILLS

1. FULL NAMES OF SPOUSE #1 AND SPOUSE #2:

2. HOME ADDRESS, TELEPHONE NUMBERS & EMAIL ADDRESSES:

3. FULL NAMES AND AGES OF CHILDREN AND OTHER BENEFICIARIES:

4. BEQUEST OF PERSONAL PROPERTY. Please indicate whom you wish to give your personal property (i.e., household furnishings, jewelry, clothing and automobiles). Typically, personal property would pass to the surviving spouse and then to the children after the death of the surviving spouse. Also, please note any other specific gifts of cash or property you wish to give to individuals or charities:

5. BEQUEST OF REMAINING PROPERTY. Please indicate whom you wish to receive your remaining property at your death. Typically, the remaining property would pass outright to the surviving spouse. At the death of the surviving spouse, we recommend that the remaining property be held in trust for the benefit of your children until they reach a certain age. For example, the trust property can be held and used for their benefit as determined by the Trustee with the child given the right to withdraw the property at certain ages (e.g., 1/3 at age 25, 2/3 at age 30, and remaining trust property at age 35):

6. APPOINTMENT OF EXECUTOR. Please indicate whom you wish to serve as your Executor. The Executor will be responsible for administering your estate, which includes paying any debts and distributing your assets. Typically, the spouse is appointed, but it is recommended that you appoint one or more successors to act in case he or she is unable to act.

FOR SPOUSE #1: _____

FOR SPOUSE #2: _____

7. APPOINTMENT OF TRUSTEE. Please indicate whom you wish to serve as trustee of the trusts to be created for your children. It is recommended that you appoint one or more successors:

8. APPOINTMENT OF GUARDIAN FOR MINOR CHILDREN. Please indicate whom you wish to serve as guardian of your minor children. It is recommended that you appoint one or more successors:

9. APPOINTMENT OF AGENT. Please indicate whom you wish to serve as your Agent under your Durable Power of Attorney. The Agent will be able to act on your behalf with respect to your financial affairs if you are unable to do so during your lifetime if you become incapacitated. Typically, your spouse is appointed as the initial Agent, but it is recommended that you appoint one or more successors to act if he or she is unable to act.

FOR SPOUSE #1: _____

FOR SPOUSE #2: _____

10. APPOINTMENT OF HEALTH CARE AGENT. Please indicate whom you wish to serve as your Health Care Agent under your Health Care Power of Attorney. The Health Care Agent will be able to act on your behalf with respect to your health and medical affairs if you are unable to do so during your lifetime if you become incapacitated. Typically, your spouse is appointed as the initial Health Care Agent, but it is recommended that you appoint one or more successors to act if he or she is unable to act. Also, please include the contact information (addresses and phone numbers) for the persons indicated.

FOR SPOUSE #1: _____

FOR SPOUSE #2: _____

11. ARE THERE ANY SPECIAL CIRCUMSTANCES OR OTHER INFORMATION THAT WE SHOULD BE AWARE OF: _____
