Estate Planning Questionnaire

This questionnaire is designed to help me fill in the information required by your legal documents as well as identify and mitigate against what I call 'red flags.' Please fill out the questionnaire to the best of your ability but do not be upset if you have difficulties. We will review the information at our meeting and, if needed, work together to obtain any missing information or fill in gaps.

For a Will package, there may be a "trust" in your Will that only comes into play at your death and depending upon the terms of your Will. This type of trust, called a testamentary trust, may only come into play upon your passing. You will want to think about who should be named as Trustee or Co-Trustees. There may even be more than one trust with different trustees for each trust.

For a Trust package, there will be a trust set up now and come into play once the trust document is executed. You will want to complete the separate one-page additional Lifetime Trust Questionnaire.

After we review the Estate Planning Questionnaire (and the Lifetime Trust Questionnaire, if applicable), I will use this information to create your legal documents.

Please make sure all names, addresses and phone numbers are correct.

For a couple, please make sure each of you fills out your own Estate Planning Questionnaire.

Time Estimate for Completion: 1-2 hours

OVERALL GOALS AND CONCERNS:

1. What your estate planning objectives for now?

2. Do you have concerns about:
    a. Trust issues between family members
    b. Fighting among family members
    c. Financial mismanagement by a loved one
    d. Asset protection for loved ones for any number of reasons, including creditors, divorce, addictions, etc.

3. Do you have any interest in referrals for:
    a. Retirement planning
    b. Debt-financial planning
    c. Home or business clean-out
    d. Home or business organization
    e. Professional photography for preserving memories
    f. Digital asset workshop to organize your digital life

Your Basic Information

Please note that your Social Security Number may be needed depending on the planning involved. I will advise if I need this during our engagement.

1. Your name and any prior names you have used:

2. Your current address, including Road/Drive/Avenue, etc., the zip code and County:

3. Your phone number(s):

4. Your email(s):

5. Your date of birth:

6. Your current spouse's name, as applicable:

7. Your domestic partner's name, as applicable:

8. Are you a United States citizen?

Your Background (Marriages, Military, Medicaid, Insurances and Health)

1. Any prior marriages/separated from spouse or divorced? Please state date of divorce and place of divorce or date of death and place of death, as appropriate.

2. Have you served or are you currently serving in the military?

3. Are you receiving any Medicaid or Veterans Benefits?

4. Do you have any Long-Term Care Insurance?

5. What is the status of your health?

Planning Considerations (Family, Charities, Sentimental Items, Pets, Business Interests, Digital Assets, etc.)

1. Do any family members/beneficiaries that will be named in your Will require special attention or are disabled or seriously ill?

2. Are there any charitable organizations or other organizations that you would like to include in your estate plans?

3. Are there any sentimental or other items that you would like to leave to someone in particular?

4. Do you have pets that you would like to include in your planning?

5. Are there any other entities that might be affected by your planning, such as an LLC, Corporation, or dba?

6. What are your digital assets, such as emails, social media accounts, digital financial accounts which are "quasi-digital" where financial accounts are also online, online billing accounts, crypto technology, etc.)

Asset information

For asset information include how each asset is titled, the approximate values and any beneficiary designations, as appropriate. For real estate, please provide any real estate tax exemptions.

1. Real Estate:

2. Cash/Coins:

3. Checking/Savings Accounts:

4. Certificates of Deposit or share certificates at credit unions:

5. Brokerage Accounts/Stocks:

6. Savings Bonds:

7. Life Insurance:

8. Retirement Benefits:

9. Promissory Notes/Annuities/Mortgages to which you are owed money, etc.:

10. Tangible Personal Property (vehicles, jewelry, valuables, etc.):

11. Safe Deposit Box Contents:

12. Business Interests (sole proprietor, member interests, corporate interests, partnerships, etc.):

13. Digital Assets:

14. Others:

Liability Information

Please list any mortgages, judgments, liens, pending lawsuits, other creditors, etc.:

What your debts? This may affect the planning you desire to do.

Are your debts causing you concern?

Current Estate Planning Documents (What do you have – we need to know!)

Do you have a Will? If yes, where is the original?

Do you have a Power of Attorney?

Do you have a Health Care Proxy/Living Will?

Burial Arrangements?

Current Trusts? Indicate if irrevocable or revocable

Do you have other important documents? This would include Trusts, Buy-Sell Agreements, Pre or Post Nuptial Agreements, etc.

Your Personal Team (Let's get prepared with the right people and good communication!):

"Who" is named in estate documents is so important. Estate administrators will do their best to track down beneficiaries and people nominated to fulfill roles in your estate's administration, but it's not always easy. (Remember "Goose" from the movie Top Gun? How would you start tracking down that person if that nickname was all you knew about them?!?)

Please provide legal names with middle initials for all individuals. If a person does not use a middle initial, please state so. If an address is requested, please include Road/Drive/Avenue, etc., the zip code and County. If a phone number is required, list any number(s) at which the individual can be contacted in case of an emergency.

Your Will:

Please provide the correct legal names with middle initials for:

- Executor:
- Alternate Executor:
- Guardian (for minor children):
- Alternate Guardian:
- Trustee for Testamentary Trust (if applicable):
- Successor Trustee for Testamentary Trust (if applicable):

Your Power of Attorney:

Please provide the correct legal names with middle initials, along with current addresses for:

Primary Agent(s):

Successor Agent(s):

Your Health Care Proxy:

Please provide the correct legal names with middle initials, along with current addresses and current phone numbers for:

Primary Agent:

Alternate Agent:

Second Alternate Agent (if applicable):

Your Professional Team:

Who are those professionals that can be quite a help in planning and a time of need:

Insurance Agent:

Tax Preparer:

Investment Advisor:

Realtor:

Other:

If a Professional Advisor referred you, do you want my office to contact him/her and let them know you have met with us?

Family Tree:

Family Tree information can be simple or complicated. We will review your Family Tree and discuss any potential gaps in information, red flag situations and how to address any difficulties with your estate planning matters.

For your family information, you need to provide legal names, full addresses and relationships of your "next of kin" or those considered your likely "intestate heirs". It is important that all individuals are listed, even if you are estranged.

Please provide the names of your "next of kin" which can be thought of as your closest family members

- current spouse,
- children (adopted or biological, and any children who have passed); please provide the following for children:
  ° dates of birth
  ° name of other parent
  ° state for each child, if he/she was born from a marital relationship or a non-marital relationship
- grandchildren; please provide the following for grandchildren:
  ° dates of birth
  ° provide parents' names
- any prior marriages, with the date of divorce or death.

If you do not have a spouse, child, or grandchildren:

- please note that for this record, and
- list your parents' names
  - If they are living, include the state(s) in which they are currently living.
  - If they have passed, include the date(s) of death.

If both parents have passed and you do not have a spouse, child, or grandchildren:

- please note that for this record, and
- list all of your siblings; if any of your siblings have passed, please note their date(s) of death.

If you have raised someone who is not a formally adopted or biological child, please list that person separately and make a note of your special relationship.