

## ESTATE PLANNING QUESTIONNAIRE

1. **Client's full name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_
2. **Other names used:** \_\_\_\_\_
3. **Home telephone:** \_\_\_\_\_ **Other telephone:** \_\_\_\_\_
4. **Second Client's full name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_
5. **Second client's other names used:** \_\_\_\_\_
6. **Address:** \_\_\_\_\_
7. **Date of birth:** \_\_\_\_\_
8. **Citizenship:** \_\_\_\_\_
9. **Second client's date of birth:** \_\_\_\_\_
10. **Second client's citizenship:** \_\_\_\_\_
11. **Marital Status: (Date and place)** \_\_\_\_\_
12. **Prior Marriage(s), date, how and when terminated:** \_\_\_\_\_  
\_\_\_\_\_
13. **Names of children of present marriage, with age, residence and marital status:**  
\_\_\_\_\_  
\_\_\_\_\_
14. **Names of children of prior marriage(s), with age, residence and marital status:**  
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\_\_\_\_\_

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**15. Names of grandchildren (if applicable):**

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**16. Children or grandchildren with disabilities, and description of each disability:**

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**17. Real estate, with location, general description, estimated value, mortgages, how and when acquired:**

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**18. Life insurance policies:**

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**19. Retirement plans:**

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**20. Bank and savings accounts: (joint, trust, etc.) \_\_\_\_\_**

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**21. Other assets:**

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**22. Any existing wills:** \_\_\_\_\_ **Where located:** \_\_\_\_\_

**23. Names and relationship of other relatives to be included in estate planning:**

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**24. Distribution plans for estate: (to spouse, children, other relatives)**

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**25. Executor(s) and alternative(s):**

**Name:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_

**Address:**

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**Name:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_

**Address:**

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

Address:

\_\_\_\_\_

**26. Trustee(s) and alternate(s):**

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

Address:

\_\_\_\_\_

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

Address:

\_\_\_\_\_

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

Address:

\_\_\_\_\_

**27. Guardian(s) of minor children and alternate(s):**

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

Address:

\_\_\_\_\_

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

Address:

\_\_\_\_\_

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

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

**28. Other information:**

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