

Estate Planning Questionnaire

Planning Information	
Full Legal Name	
Date of Birth	
Citizenship	
Address	
Phone Number	
E-mail address	
Childrens' Names and dates of birth	
Personal Representative	
Alternate Personal Representative	
Trustee	
Alternate Trustee	
Health Care Decision Maker	
Alternate Health Care Decision Maker	
Power of Attorney Holder	
Alternate Power of Attorney Holder	
Guardian for children	
Alternate Guardian	
Conservator for children	
Alternate Conservator	
Specific Bequests	
Remainder Beneficiary(ies)	
Contingent Beneficiary	

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Financial/Tax Planning Information	
Do you have life insurance? How much?	
Do you have Retirement Accounts and what is their value?	
How much do you have in the bank?	
How much do you have in investment accounts?	
Do you own real estate and what is its value?	
What is the amount of debt, if any secured by your real estate?	
Do you have any real estate in other states?	
Do any of your beneficiaries have special needs?	
Have you ever been divorced?	
Do you have a prenuptial, postnuptial or community property agreement	
Do you have existing estate planning documents?	
Have you ever filed a gift tax return?	
Do you have any specific wishes regarding your funeral arrangements?	
Do you own your own business? If so what is its value?	
Does anyone owe you money pursuant to a note?	
Do you have any other concerns or special wishes?	