



To Our Clients:

In order for us to properly assist you in planning your estate, we must know the nature and value of your assets. It is only with this information that we can advise you as to tax liabilities and possible problem areas that need attention. Please take a few minutes to fill out this Questionnaire. All of the information requested is important, and you may find that completing this form is helpful to you as a review of your present situation. We will retain this document as part of your permanent file in our office, but you may be assured that all of the information you furnish is strictly confidential, and will not be disclosed to anyone outside of our firm without your permission. Kindly bring this form with you when you come to our office for your first appointment.

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

1 Do you now have a Will? _____

2. Names:

Husband: _____
Social Sec. Num (Optional): _____ Birth date: _____ U.S. Citizen? _____

Have you ever lived in a community property state, e.g., Arizona, Texas, California or Louisiana? _____

Wife: _____
Social Sec. Num (Optional): _____ Birth date: _____ U.S. Citizen? _____

Have you ever lived in a community property state, e.g., Arizona, Texas, California or Louisiana? _____

3. Home Address: _____
Telephone: _____
E-Mail: _____

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

4. Employers:

Husband: _____

Wife: _____

5. Approximate yearly income of both spouses combined: _____

6. Children

Name, Address and Birth dates:

7. Name and relationship of anyone else dependent on you for support:

8. Are you or any of your children or dependents under any physical or mental disability? If so, please explain:

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

9. If either spouse is enrolled in a pension, profit sharing or retirement plan, please give brief details:

10. Does either spouse have an Individual Retirement Account (IRA)? If so, please describe:

11. Real estate owned: Please list the information requested under the appropriate headings. Continue on the back of last page of the form if you need more space.

	Address:	Owned by Husband, Wife, or Joint?	Mortgage Balance	Estimated Value
Principal Residence:				
Second Home(s):				
Farms – Indicate Acreage				
Income Properties:				
Land Contract Interests – Buyer or Seller?				

Please determine the whereabouts of your deeds and abstracts (or title insurance policies) for your real estate. We may need to have you bring these in later so that we can review certain information they contain.

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

14. Life Insurance (include insurance provided by employer):

Name of Company	Whose Life?	Whole Life or Term?	Beneficiary?	Policy Amount

15. Do you own a business, or any interest in a business? If so, please provide brief details as to the name, location and nature of the business and provide us with a copy of the most recent balance sheet. We will discuss further questions with you personally.

16. Farmers: Please list aggregate values for farm machinery and equipment, livestock, growing crops and crops in storage.

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

17. Motor vehicles, motorcycles, boats and recreational vehicles: Please list make and year, name of titled owner and approximate value.

18. Do you know of any environmental problems in connection with any real estate you are involved with?

19. Do you have any personal property of unusual value, such as jewelry, works of art, antiques or collections? Please list brief details and estimated values.

20. Does anyone owe you any substantial amount of money? Please give details.

21. Does either spouse expect to receive an inheritance of over \$10,000? _____

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

If yes, please give details: _____

22. Have you ever made any gifts over \$10,000 or filed a gift tax return? _____

If yes, please give details: _____

23. Names of banks with whom you do business: _____

24. Location of your safety deposit box: _____

25. Name and address of your accountant or tax preparer: _____

Thank you for your assistance. We will be glad to discuss any questions with you personally at our first meeting.

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