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## **ESTATE PLANNING QUESTIONNAIRE**

### Instructions to Client:

1. Please fill out this form and e-mail it back to [Matthew@MatthewHartLaw.com](mailto:Matthew@MatthewHartLaw.com)
2. When coming in for an appointment please bring the following:
  - a. A copy of your old will or trust, if applicable;
  - b. A copy of the Grant Deed (including the legal description) to any real estate you own;
  - c. A printed copy of this form.
  - d. Your check book, if you would like us to get started immediately. There is no charge for the initial appointment if you decide not to hire me. If you choose to hire me, I will give you an estimate of my fees and sign a written fee agreement. I require a deposit of one-half of the estimated fees before I begin working.

### **Intro Questions**

Have you spoken to any other lawyers about a will and trust? YN

Do you currently have a will YN

Do you currently have a trust YN?

Has your will or trust ever been amended? YN

### **Client Personal Information**

Man/Husband's Name \_\_\_\_\_ Date of Birth: \_\_\_\_\_

US Citizen? YN Prior Marriage YN Date & Place Marriage ended: \_\_\_\_\_

Occupation: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell Phone \_\_\_\_\_

Home Address: \_\_\_\_\_ Home Phone: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Woman/Wife's Name \_\_\_\_\_ Date of Birth: \_\_\_\_\_

US Citizen? YN Prior Marriage YN Date & Place Marriage ended: \_\_\_\_\_

Occupation: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell Phone \_\_\_\_\_

Home Address: \_\_\_\_\_ Home Phone: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Safe Deposit Box (location): \_\_\_\_\_

Current Marriage Date: \_\_\_\_\_ Place of Marriage: \_\_\_\_\_

### **Children**

(Please indicate if any children are from a prior marriage or if any children are deceased next to their name)

Name: Birthdate: Residence (City and State) Relation to both Spouses

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

### **Grandchildren**

(Please list Grandchildren **if you plan on naming them** as a beneficiary instead of your children)

Name: Birthdate: Residence (City and State) Status

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## Immediate Family Members

(If there is no spouse, children or grandchildren, please list your immediate family members below)

<u>Name:</u>	<u>Birthdate:</u>	<u>Residence (City and State)</u>	<u>Relationship:</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## Assets

### Real Estate

Please list each piece of real property by address, description (i.e. primary residence, secondary residence, land, vacation home, rental property, commercial property) and asset value

<u>Address:</u>	<u>Description:</u>	<u>Value:</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Bank Accounts

Please list by Bank and account #, type (i.e. checking , savings, CD, money market) and value.

<u>Bank</u>	<u>Type:</u>	<u>Value:</u>
_____	_____	_____
_____	_____	_____



**Insurance Policies**

Please list by Insurance Company and Policy #, type (i.e. term policy, whole life, policy, universal life policy, variable life policy etc.) and value.

<u>Insurance Policy:</u>	<u>Type:</u>	<u>Value:</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Business**

Please list Name, type (i.e. general partnership, limited partnership, C Corporation, S corporation, sole proprietorship, LLC, etc.) and value.

<u>Name of Company:</u>	<u>Type:</u>	<u>Value:</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Other:**

Please list other assets of significant value by type (i.e. boats, collectibles, automobiles, etc.) and value.

<u>Type:</u>	<u>Value:</u>
_____	_____
_____	_____
_____	_____
_____	_____

**Total Asset Value (Gross Estate Value):** \_\_\_\_\_



**Beneficiaries:** (remainder after specific gifts)

Name:

Amount of Percentage:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Alternate Beneficiaries:** If all of the above named beneficiaries predecease you, how would you want your estate distributed? (heirs at law, certain relatives, charities, etc.)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Executor (for wills):**

Name & Address: \_\_\_\_\_ Relationship: \_\_\_\_\_

\_\_\_\_\_

Name & Address: \_\_\_\_\_ Relationship: \_\_\_\_\_

\_\_\_\_\_

**Successor Trustee (for trusts, can be the same as the executor):**

Name & Address: \_\_\_\_\_ Relationship: \_\_\_\_\_

\_\_\_\_\_

Name & Address: \_\_\_\_\_ Relationship: \_\_\_\_\_

\_\_\_\_\_

