

**ESTATE PLANNING QUESTIONNAIRE**

**SECTION 1: FAMILY DATA**

**Name** (as signed): \_\_\_\_\_

SSN: \_\_\_\_\_

DOB: \_\_\_\_\_

Occupation: \_\_\_\_\_

Military:        Y / N

Employer: \_\_\_\_\_

Employer's Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ (home) \_\_\_\_\_ (work / cell)

**Spouse's Name** (as signed): \_\_\_\_\_

SSN: \_\_\_\_\_

DOB: \_\_\_\_\_

Occupation: \_\_\_\_\_

Military:        Y / N

Employer: \_\_\_\_\_

Employer's Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ (home) \_\_\_\_\_ (work / cell)

**Residence**

Primary Residence: \_\_\_\_\_

\_\_\_\_\_

County: \_\_\_\_\_

Other Residence(s): \_\_\_\_\_

\_\_\_\_\_

**Citizenship**

Self: U.S.: Y / N State: \_\_\_\_\_ Other: \_\_\_\_\_

Spouse: U.S.: Y / N State: \_\_\_\_\_ Other: \_\_\_\_\_

**Children**

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

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

Phone: \_\_\_\_\_ D.O.B. \_\_\_\_\_

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

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

Phone: \_\_\_\_\_ D.O.B. \_\_\_\_\_

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

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

Phone: \_\_\_\_\_ D.O.B. \_\_\_\_\_

**Other Descendants or Dependents:** \_\_\_\_\_  
\_\_\_\_\_

**Marital History**

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

Prior Marriages and Divorces: \_\_\_\_\_  
\_\_\_\_\_

**SECTION 2: ASSETS AND LIABILITIES**

**Real Estate**

Location	Estimated Value	Mortgage

Leases: \_\_\_\_\_

\_\_\_\_\_

**Stocks and Bonds**

Brokerage Accounts:

	\$
	\$
	\$

Custodian Accounts:

	\$
	\$

Certificates:

	\$
	\$
	\$

**Cash, Mortgages, and Notes**

Checking Accounts:

	\$
	\$
	\$

Savings Accounts:

	\$
	\$
	\$

Mortgages and Notes (Monies owed to you):

	\$
	\$
	\$

**Business Interests**

Company: \_\_\_\_\_ Value: \_\_\_\_\_

Company: \_\_\_\_\_ Value: \_\_\_\_\_

**Life Insurance**

<u>Insured</u>	<u>Company</u>	<u>Death Benefit</u>	<u>Beneficiary</u>

**Retirement Plans**

Owner: \_\_\_\_\_

<u>Location/Plan Title</u>	<u>Value</u>	<u>Beneficiary</u>

Owner: \_\_\_\_\_

<u>Location/Plan Title</u>	<u>Value</u>	<u>Beneficiary</u>

**Annuities**

---



---

**Miscellaneous Property**

Tangible Personal Property Items

	\$
	\$
	\$

Automobiles

	\$
	\$
	\$

**SECTION 3: DEBTS**

Current Debts

Creditor	Amount

Mortgages, Home Equity Loans

Creditor	Amount

Personal Loans

Creditor	Amount

Other

Creditor	Amount

**SECTION 4: ESTATE PLAN**

**Specific Bequests:**

<b><u>Item/Amount</u></b>	<b><u>Beneficiary</u></b>

**Residuary Bequest (Remainder of Estate)**

**Beneficiaries:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Guardians(s) for Minor Children:** \_\_\_\_\_  
\_\_\_\_\_

**Personal Representative(s):**  
\_\_\_\_\_

**SECTION 5: MISCELLEANOUS CONCERNS / OTHER COMMENTS**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_