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## Estate Planning Questionnaire

*(Instructions: Please either (1) Fill in on Computer and Print, or (2) Print & Fill in by Hand)*

### I. CLIENT INFORMATION:

- A. Husband's full legal name: \_\_\_\_\_
- B. Wife's full legal name: \_\_\_\_\_
- C. Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_
- D. Telephone: Home Phone \_\_\_\_\_  
Husband's Cell \_\_\_\_\_ Office \_\_\_\_\_  
Wife's Cell \_\_\_\_\_ Office \_\_\_\_\_
- E. Email Addresses: Husband: \_\_\_\_\_  
Wife: \_\_\_\_\_
- F. Husband's Date & Place of Birth: \_\_\_\_\_
- G. Wife's Date & Place of Birth: \_\_\_\_\_
- H. Date and Place of Marriage: \_\_\_\_\_
- I. Husband's Employer Name, Address, & Telephone: \_\_\_\_\_  
\_\_\_\_\_
- J. Wife's Employer Name, Address, & Telephone: \_\_\_\_\_  
\_\_\_\_\_

### II. FAMILY INFORMATION:

#### A. Children: (Please use full legal names)

- 1. Name: \_\_\_\_\_ Age: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_
- 2. Name: \_\_\_\_\_ Age: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_
- 3. Name: \_\_\_\_\_ Age: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Age: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_
- 5. Name: \_\_\_\_\_ Age: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_
- 6. Name: \_\_\_\_\_ Age: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_
- 7. Name: \_\_\_\_\_ Age: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_

B. Names of Children with Special Needs (if any): \_\_\_\_\_  
\_\_\_\_\_

**C. Names of other family members (if living):**

1. **Husband's Parents:** \_\_\_\_\_
2. **Husband's Brothers and Sisters:** \_\_\_\_\_  
\_\_\_\_\_
3. **Wife's Parents:** \_\_\_\_\_
4. **Wife's Brothers and Sisters:** \_\_\_\_\_  
\_\_\_\_\_

**III. GUARDIANS, PERSONAL REPRESENTATIVES, & TRUSTEES:**

**A. Personal Representatives:** Whom do you desire to be the Personal Representative (Executor) of your probate estate?

1. **First Choice for Personal Representative (after your spouse):**  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Relationship: \_\_\_\_\_
2. **Second Choice for Personal Representative:**  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Relationship: \_\_\_\_\_
3. **Third Choice for Personal Representative:**  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Relationship: \_\_\_\_\_

**B. Guardians:** If your children are still minors or are handicapped, whom would you desire to be their Guardians if both parents pass away before they become adults?

1. **First Choice for Guardian:**  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Relationship: \_\_\_\_\_
2. **Second Choice for Guardian:**  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Relationship: \_\_\_\_\_
3. **Third Choice for Guardian:**  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Relationship: \_\_\_\_\_

**C. Trustees:** If you have minor children, or if you wish to have your estate held until your children are older before they receive their inheritance, whom do you desire to be the Successor Trustees of your estate:

**1. First Choice for Successor Trustee:**

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

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

Telephone: \_\_\_\_\_ Relationship: \_\_\_\_\_

**2. Second Choice for Successor Trustee:**

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

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

Telephone: \_\_\_\_\_ Relationship: \_\_\_\_\_

**3. Third Choice for Successor Trustee:**

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

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

Telephone: \_\_\_\_\_ Relationship: \_\_\_\_\_

**IV. ASSETS:**

**A. Real Estate** (including residence, investment, time share, and business real estate):

**1. Address of Real Estate:** \_\_\_\_\_

Title in Name of: \_\_\_\_\_

**2. Address of Real Estate:** \_\_\_\_\_

Title in Name of: \_\_\_\_\_

**3. Address of Real Estate:** \_\_\_\_\_

Title in Name of: \_\_\_\_\_

**4. Are any of these properties located in another state?** \_\_\_\_ Yes \_\_\_\_ No

**B. Bank / Savings & Loan / Credit Union Accounts:**

**1. Checking Accounts:**

Name of Institution	Branch Location	<i>Approximate</i> Acct. Balance:
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_____	_____	\$ _____
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_____	_____	\$ _____
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_____	_____	\$ _____
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**2. Savings Accounts:**

Name of Institution	Branch Location	Acct. Balance:
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_____	_____	\$ _____
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_____	_____	\$ _____
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_____	_____	\$ _____
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**3. Individual Retirement Accounts (IRA's):**

Owner/Employee's Name	Acct. Administrator	Acct. Balance:
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_____	_____	\$ _____
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_____	_____	\$ _____
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_____	_____	\$ _____
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**C. Stocks and Bonds:**

**Name of Brokerage Company:** \_\_\_\_\_  
Value of all Securities: \$ \_\_\_\_\_

**Name of Brokerage Company:** \_\_\_\_\_  
Value of all Securities: \$ \_\_\_\_\_

**D. Life Insurance Policies:**

**Name of Insurance Company:** \_\_\_\_\_  
Name of Insured Person: \_\_\_\_\_  
Policy Number: \_\_\_\_\_ Amount of Policy: \$ \_\_\_\_\_  
Beneficiary's Name(s): \_\_\_\_\_

**Name of Insurance Company:** \_\_\_\_\_  
Name of Insured Person: \_\_\_\_\_  
Policy Number: \_\_\_\_\_ Amount of Policy: \$ \_\_\_\_\_  
Beneficiary's Name(s): \_\_\_\_\_

**E. Annuities:**

**Name of Annuity Company:** \_\_\_\_\_  
Name of Person Receiving Annuity: \_\_\_\_\_  
Policy Number: \_\_\_\_\_ Amount of Annuity: \$ \_\_\_\_\_  
Beneficiary's Name(s): \_\_\_\_\_

**F. Long Term Care Insurance:**

**Name of Insurance Company:** \_\_\_\_\_  
Policy Number: \_\_\_\_\_

**G. Contracts Under Which You Are Receiving Payments:**

Name of Person Making Payments: \_\_\_\_\_  
Current Remaining Balance of Contract: \_\_\_\_\_

**H. Automobiles:**

Description (Model & Year) of Automobile #1:  
\_\_\_\_\_

Description (Model & Year) of Automobile #2:  
\_\_\_\_\_

Description (Model & Year) of Automobile #2:  
\_\_\_\_\_

**I. Other Vehicles, Boats, Trailers, etc.**

Description (Model & Year) of Vehicle #1:  
\_\_\_\_\_

Description (Model & Year) of Vehicle #2:  
\_\_\_\_\_

Description (Model & Year) of Vehicle #3:  
\_\_\_\_\_

**J. Miscellaneous Items of Unusual Value** (i.e. Antiques, Jewelry, Guns, etc.)

**Describe items and estimated value:** \_\_\_\_\_  
\_\_\_\_\_

**Which of these items (a) were owned before you were married or (b) were inherited by either of you during the marriage:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

**K. Safe Deposit Box** (if any):

Bank Name: \_\_\_\_\_ Branch: \_\_\_\_\_

**V. MISCELLANEOUS INFORMATION:**

**A. Do you wish to have a Living Will** (instructing your family and physicians regarding the medical care and other treatment that you wish to receive in the event you are in a coma)?

\_\_\_ Yes \_\_\_ No \_\_\_ Have One Already

**B. Do you wish to be buried or cremated?**

\_\_\_\_\_ Buried \_\_\_\_\_ Cremated \_\_\_\_\_ Don't Care

Have you made burial or cremation arrangements? \_\_\_ Yes \_\_\_ No

If so, with whom: \_\_\_\_\_

**C. Approximate total value of your entire estate** (including life insurance) before deducting debts that you owe:

1. **Value of Total Estate:** \$ \_\_\_\_\_
2. Value of Husband's Share: \$ \_\_\_\_\_
3. Value of Wife's Share: \$ \_\_\_\_\_

**D. Name, Address, and Telephone No. of your Accountant** (if any):

\_\_\_\_\_

**E. How did you hear about this office's practice in the area of Wills & Trusts?**

(Please check all that apply):

1. \_\_\_ I/we had other legal work done by Peters Patchin & Monaghan
2. \_\_\_ Saw website at *PPM-Law.com*
3. \_\_\_ *Yelp\**
4. \_\_\_ Flyer in *Idaho Statesman*
5. \_\_\_ Flyer in *Idaho Press Tribune*
6. \_\_\_ Referred by \_\_\_\_\_ (Name)
7. \_\_\_ Other: Please specify: \_\_\_\_\_

**G. Please list any other questions or special circumstances that you wish to discuss:**

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