ESTATE PLANNING QUESTIONNAIRE

I. Personal Data

A. Client's Full Name ______________________________

Address ______________________________

____

Phone (H) ______________(W)______________

Date of Birth ______________Social Security Number ______________

Prior Marriage ______________Citizenship______________

B. Name of Spouse ______________________________

Phone (W) ______________________________

Date of Birth ______________Social Security Number ______________

Prior Marriage ______________Citizenship______________

C. Children

1. Child's Name ______________ Date of Birth ______________

Address ______________________________

____

Child's Spouse's Name ______________________________

Child's Children ______________ Age ______________

Child's Children ______________ Age ______________

Child's Children ______________ Age ______________

2. Child's Name ________________________________ Date of Birth ___________________

Address ____

____

Child's Spouse's Name ____

Child's Children ____ Age _____________

Child's Children ____ Age _____________

Child's Children ____ Age _____________

3. Child's Name ________________________________ Date of Birth ___________________

Address ____

____

Child's Spouse's Name ____

Child's Children ____ Age _____________

Child's Children ____ Age _____________

Child's Children ____ Age _____________

4. Child's Name ________________________________ Date of Birth ___________________

Address ____

____

Child's Spouse's Name ____

Child's Children ____ Age _____________

Child's Children ____ Age _____________

Child's Children ____ Age _____________

II. Annual Income

	Employment	Social Security	Pension	Investment	Other	Total
Client						$0.00
Spouse						$0.00

Total Annual Income $ 0.00

III. Assets and Liabilities

A. **Cash Accounts**

	Description	Value	Owner
1.			
2.			
3.			
4.			
5.			

Total Cash Accounts $ 0.00

B. **Brokerage Accounts**

	Description	Value	Owner
1.			
2.			
3.			
4.			
5.			

Total Brokerage Accounts $ 0.00

E. **Business Interests**

	Name of Business	Value	Owner
1.			
2.			
3.			
4.			

Total Business Interests $__________

F. **Family Limited Liability Companies / Family Limited Partnerships**

	Name of FLLC / FLP	Value	Owner
1.			
2.			
3.			
4.			

Total FLLC / FLP Interests $__________

G. **Notes and Accounts Receivable**

	Description	Value	Owner
1.			
2.			
3.			
4.			

Total Notes / Accounts Receivable $__________

H. **Other Assets**

	Description	Value	Owner
1.			
2.			
3.			
4.			
5.			

Total Other Assets $__________

I. **Life Insurance Policies Owned by Client and Spouse**

	Name of Insurance Co.	Owner	Insured	Type	Death Benefit	Cash Value	Designated Beneficiary
1.							
2.							
3.							
4.							
5.							
6.							

Total Life Insurance Death Benefits $__________

J. **Retirement Plans, IRAs and 401(k) Plans**

	Company	Plan Type	Value	Participant/ Plan Owner
1.				
2.				
3.				

4.

5.

6.

7.

8.

Total Retirement Plans $__________

K. **Non-Qualified Annuities (not IRAs)**

	Company	Owner	Annuitant	Beneficiary	Basis	Value
1.						
2.						
3.						
4.						

Total Annuities $__________

L. **Liabilities** (other than Mortgages)

	Name of Lender	Type of Account	Balance Owed
1.			
2.			
3.			
4.			

Total Liabilities $__________

M. **Summary of Assets and Liabilities**

A.	Cash Accounts	$__________
B.	Brokerage Accounts	__________
C.	Stocks and Bonds	__________
D.	Real Estate Equity	__________
E.	Business Interests	__________
F.	FLPs / FLLCs	__________
G.	Notes / Accounts Receivable	__________
H.	Other Assets	__________
I.	Life Insurance	__________
J.	Retirement Plans	__________
K.	Annuities	__________
L.	Liabilities	(__________)
	Total Net Worth	$___________

S:\Documents\JPJ\Website\Articles and Outlines on Website\Estate Planning Questionnaire.doc