

ESTATE PLANNING QUESTIONNAIRE

A. Personal Data

Full Name of Husband _____
(as you want it to appear in your documents)

Date of Birth _____

Occupation _____

Social Security No. _____

Prior Marriage Yes No

U.S. Citizen Yes No

Full Name of Wife _____
(as you want it to appear in your documents)

Date of Birth _____

Occupation _____

Social Security No. _____

Prior Marriage Yes No

U.S. Citizen Yes No

Mailing Address
(including zip code) _____

City/Town/Village _____

County _____

Telephone (residence) _____

Telephone (husband's office) _____

Telephone (wife's office) _____

E-mail(s) _____

Children

Names	Dates of Birth	Post Office Address

Husband's Family

Parents: _____

Brothers: _____

Sisters: _____

Wife's Family

Parents: _____

Brothers: _____

Sisters: _____

Professional Advisers

Accountant: _____

Investment Advisor: _____

Insurance Agent: _____

B. Miscellaneous Information

(1) Closely-held Business Interest Yes No

Name and Address of Business: _____

Type of Ownership _____
(Corporation/Partnership/Other)

Buy-Sell Agreement Yes No

(2) Trust in effect for benefit of

Husband: Yes No

Wife: Yes No

(3) Separation agreement with former spouse

Husband: Yes No

Wife: Yes No

(4) Pre-marital agreement between Husband and Wife

Husband: Yes No

Wife: Yes No

(5) Gift tax returns previously filed

Husband: Yes No

Wife: Yes No

(6) Gifts to children under Uniform Trusts to Minors Act

Husband: Yes No

Wife: Yes No

(7) Do you presently have Health Care Declarations or Living Wills

Husband: Yes No

Wife: Yes No

(8) Do you presently have Powers of Attorney

Husband: Yes No

Wife: Yes No

C. Summary of Assets and Liabilities and Identity of Ownership
 - please show approximate values.

	Husband	Wife	Joint
Residence(s)			
Other real estate			
Stocks and Bonds			
Bank Accounts			
Business Interests			
Mortgages and Notes Owed by Others to You			
IRA Balances			
Pension/Profit Sharing Balances			
Annuities			
Automobiles			
Furniture, Furnishings Jewelry and Clothing			
Life Insurance face value: owner: beneficiary: term or whole life:			
Stock Options/Other			
Equity Compensation			
Interests (Phantom Stock, Deferred Comp.)			

LIABILITIES: