

THE LAW OFFICE OF BRIAN M. THOMPSON
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ESTATE PLANNING QUESTIONNAIRE

PART I – PERSONAL AND FAMILY INFORMATION

1. Full legal name _____
2. Address _____
3. City, State and Zip Code _____
4. County of residence _____
5. Telephone: Home _____ Work _____ Cell _____
6. Place of employment _____
7. Email: _____
8. Person who knows your whereabouts most of the time, other than a spouse:
Name _____ Telephone _____
9. Marital status: Married _____ Single _____ Divorced _____ Widowed _____
10. Have you been married before? Yes _____ No _____
11. Date of birth _____
12. Social Security No. _____
13. Are you a United States citizen? Yes _____ No _____
14. Full legal name of spouse _____
15. Spouse's date of birth _____
16. Spouse's Social Security No. _____
17. Spouse's place of employment _____

18. Is your spouse a United States citizen? Yes _____ No _____

19. *Children from current marriage:

<u>Name</u>	<u>Birth Date</u>	<u>Marital Status</u>	<u>Address, if different from yours</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

*Please list all of your children's names, even if you plan to leave them out of your Will.

19. *Children from a previous marriage:

<u>Name</u>	<u>Birth Date</u>	<u>Marital Status</u>	<u>Address, if different from yours</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

*Please list all of your children's names, even if you plan to leave them out of your Will.

20. *Children from a current or previous relationship:

<u>Name</u>	<u>Birth Date</u>	<u>Marital Status</u>	<u>Address, if different from yours</u>
_____	_____	_____	_____
_____	_____	_____	_____

*Please list all of your children's names, even if you plan to leave them out of your Will.

21. Are you planning on having more children? Yes _____ No _____ Possibly _____

22. Are any of your children adopted? Yes _____ No _____

23. Are any of your children deceased? Yes _____ No _____
24. Were any of your children born to you when you were unwed, or were any of your grandchildren born to any of your children when they were unwed? Yes _____ No _____
Please explain: _____

25. Do any of your children or others dependent on you have special needs due to mental or physical disabilities? Yes _____ No _____ Please explain: _____

26. Are you supporting any persons other than your spouse or children (such as parents, brothers or sisters, etc.)? Yes _____ No _____ Please explain: _____

PART II – FINANCIAL INFORMATION

A. Real Estate:

1. If you own your own home, list the following:

Address _____

Do you own it with anyone else? (If you do, please state who): _____

Your opinion of the home's value _____

Approx. balance of mortgage / contract for deed _____

2. If you own any other real estate, such as a farm, cabin, or rental unit, list the following:

Address or location _____

Do you own it with anyone else? (If you do, please state who): _____

Your opinion of the home's value _____

Approx. balance of mortgage / contract for deed _____

Type of property (cabin, rental, farm, etc.) _____

*If you own more real estate, please use the back of this page and provide the same information.

- B. Please list below all bank accounts, certificates of deposit, money market certificates, IRA accounts, stocks, bonds or similar assets owned either in your name alone or jointly. (This information is needed in order to determine whether a basic Will is appropriate for your situation. The information you provide is held in strict confidence. It will be discussed with you during your appointment. The Questionnaire will then be kept in your personal file.

No one else will see this Questionnaire).

<u>Bank or Co.</u>	<u>Type of Asset</u>	<u>In Whose Name</u>	<u>Beneficiary</u>	<u>Approximate Value</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

*If more space is needed, please use the back of this sheet or on a separate sheet of paper.

- C. Life Insurance (on your life):

<u>Name of Ins. Co</u>	<u>Beneficiary</u>	<u>Amount of Policy</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

- D. Do you own or have an interest in any businesses? If so, describe briefly and give the approximate value of your interest: _____

E. If you are covered by a pension or profit sharing plan, please state the name(s) of any beneficiary(s) under the plan, and its approximate value, if known:_____

F. Describe briefly, and give the approx. value, of any other valuable assets which you own (jewelry, antiques, guitars, stamp or coin collections, boats, automobiles, money owed to you by others, etc.): _____

G. Do you have child support or alimony obligations from a previous marriage? Yes ____ No____

H. List any major liabilities or debts, aside from mortgages / contracts for deed:

<u>Creditor</u>	<u>Approximate Amount Owed</u>
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_____	_____
_____	_____
_____	_____

I. Do you expect your financial situation to change substantially in the next five years?

Yes ____ No ____ Please explain _____

J. Are you the beneficiary of any trusts? Yes ____ No ____ Please explain _____

K. Have you given anyone besides your spouse any gifts worth more than \$14,000

in any calendar year? Yes ____ No ____

L. Have you formally contracted to leave any assets to any person or organization?

Yes _____ No _____

M. Have you signed any pre-marriage contract regarding disposition of your assets?

Yes _____ No _____ (If yes, please bring a copy of the agreement to your appointment.)

N. Do you currently have a Will? Yes _____ No _____

(If yes, please bring a copy of your current Will to your appointment.)

O. If you have a safe deposit box, please indicate the renters of the box and the location of the box:

PART III – GENERAL GOALS AND WISHES FOR YOUR ESTATE PLAN

1. Whom do you wish to name as your PERSONAL REPRESENTATIVE executor?

Most married persons name their spouse.

1st Choice: Name and relationship to you _____

Address _____

2nd Choice: Name and relationship to you _____

Address _____

3rd Choice: Name and relationship to you _____

Address _____

CHOOSE ONE OPTION FROM NUMBERS 2 – 5 BELOW:

2. If you are SINGLE AND HAVE CHILDREN, our basic Will leaves your estate in equal

shares to your children. If one of your children should predecease you, do you want that child's

share of your estate to:

- a. Be split up among your remaining children _____
- b. Pass to your deceased child's children _____

If you selected (b), please indicate grandchildren, if any:

<u>Name</u>	<u>Date of Birth</u>	<u>Parents</u>
_____	_____	_____
_____	_____	_____

If you want to leave your estate to persons other than your children, or only to particular children, please indicate name(s), relationship to you, and address(es) below:

3. If you are SINGLE, WITHOUT CHILDREN, whom would you want to receive your estate?

First Choice (you can choose one or more persons to share in your estate):

Name(s), Relationship to you, and Address(es) _____

If one of the persons you named does not survive you, do you want such person's share to go to his/her children, if he/she has any? Yes _____ No _____

If you would like to name a second choice of person(s) to receive your estate, please indicate:

Name(s), Relationship to you, and Address(es) _____

4. If you are MARRIED AND HAVE CHILDREN, our basic Will leaves your estate to your spouse. If your spouse does not survive you, our basic Will leaves your estate in equal shares to your children. If your spouse does not survive you and if one of your children predecease you, do you want that child's share of your estate to:

a: Be split among your remaining living children _____ OR

b: Pass to your deceased child's children _____

If you selected (b), please indicate grandchildren, if any:

<u>Name</u>	<u>Date of Birth</u>	<u>Parents</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

*If your children all still live with you, or you travel with your entire family, you may want to indicate whom you would like to receive your estate if something happens to your entire family. Most married couples choose to divide their estate in half, and leave half to each spouse's relatives (either parents, brothers and sisters, or nieces and nephews), but you may also choose to leave the estate to one or more charities. Please indicate below the proposed distribution of your estate (including name(s), relationship to you, and address(es) of the intended beneficiaries):

*If you need more space, please continue on a separate sheet of paper.

5. If you are MARRIED, BUT HAVE NO CHILDREN, our basic Will leaves your estate to your spouse. Who would you want to receive your estate if your spouse does not survive you?

Name(s), Relationship to you, and Address(es) – (you can choose one or more persons to share in your estate): _____

If one of the persons you named does not survive you, do you want such person's share to go to his / her children, if he / she has any? Yes ____ No ____

6. Our basic Will allows you to nominate a GUARDIAN who will be responsible for your children and their estates until they reach the age of eighteen. Whom would you want to be the guardian of your minor children if your spouse does not survive you?

Names, Relationship to you, and Address(es) _____

7. Our basic Will also allows you to extend the age under which your children's estates are managed until the age of twenty-one, under the Uniform Transfers to Minors Act. If you would prefer to have your children's estates managed until that age, indicate the name, relationship to you, and address of one individual whom you would like to act as custodian of your children's estates: (Note: This person may be the same person you named in your answer to #6.)

8. If you would prefer to have your children's estates managed beyond both the age of eighteen and twenty-one, you may want to set up a trust. A trust involves additional planning and drafting, as well as additional costs, but it allows more flexibility and control in planning the ages at which

your children will receive distributions from your estate. If you are interested in hearing about a trust, please inquire with our attorney drafting your Will.

9. Our basic Will allows you to make specific dollar bequests if you so wish (this is optional):

<u>Gift</u>	<u>Name, Relationship to you, and Address of the Recipient</u>
_____	_____ to _____
_____	_____ to _____
_____	_____ to _____
_____	_____ to _____
_____	_____ to _____

10. If you are married, would you want the specific bequests you named in your answer to #9 to go to the recipients named, even if your spouse survives you? Yes _____ No _____

11. In addition, our basic Will makes reference to a list of tangible personal property items. Our attorney will distribute a blank list to you, which you may fill out at home, since this list does not need to be witnessed. If you have several personal belongings to distribute, and you would like us to prepare the list, please indicate the items below (this is optional):

<u>Gift</u>	<u>Name, Relationship to you, and Address of the Recipient</u>
_____	_____ to _____
_____	_____ to _____
_____	_____ to _____
_____	_____ to _____

12. If you are married, would you want the items listed in your answer to #11 to go to the recipients named, even if your spouse survives you? Yes _____ No _____

PART IV – MISCELLANEOUS

1. Please give a brief statement of your intentions for your estate: _____

2. Please indicate below anything else you wish to discuss or questions you want answered:

3. How did you hear about our firm? _____

I hereby certify that the information I have provided in this Estate Planning Questionnaire is complete and accurate to the best of my knowledge. I hereby acknowledge that if I have not provided full and accurate disclosure of information in this Questionnaire, it may be detrimental to my attorney's ability to effectively prepare estate planning on my behalf.

Date

Client's Name