## CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

Personal Info
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First Name:			I. Last Name:			D.O.B.	Age		
Address:			City/St	ate/Zip:	1	1			
Phone:	Cell:			Email:					
Occupation:	•					Retired	1? Y N		
Current Status: Married?	How lo	ong?	Pre-nup?	Sii	ngle?	Divorced?	Widowed?		
First Name:		M.I.	Last Name:				D.O.B.	Age	
Address (if different from above):		I			City/St	ate/Zip:		1	
Phone:	Cell:			Email:					
Occupation:						Retire	d? Y N		
Have a trust now? YN	N	lame/Date	e of Current Trust:	:					
Children/Beneficiaries/Trust	ees								
Names and birthdates of children of	this mar	rriage (car	i use middle initia	ls):					
Name:			Birthd	ay: /	/	Male_	Female		
Name:			Birthd	ay: /	/	Male_	Female		
Name:			Birthd	ay: /	/	Male_	Female		
Name:			Birthd	ay: /	/	Male_	Female		
Names and birthdates of other child	ren (can	use midd	le initials)/Name o	of parent					
Name:			Birthd	ay: /	/	Male_	Female		
Name:			Birthd	ay: /	/	Male_	Female		
Name of any deceased child: Age at death:									
Name of any deceased child's childre	en and ag	ges:		<u> </u>					
Name of any disabled child:						Ag	e:		
Who will be guardian of your minor	children	(if both p							
1. (primary):    2. (backup):									
Who will inherit from you? Children	only? V	N	Others? Y	N	۵۱	ll will inherit equally? \	′ N		
Others to inherit from you (beneficiaries):						Relationship to you?		?	
	<b>,</b>							-	
State additional information from th	is page h	nere (you	may attach additi	onal page	es if nece	essary):			
i									
Successor Trustees (become trustee	after vo	u – i e et	vour death)						
1. (primary):	. arter yu	a ne. di		backup):					
NI 11			=: (:	· • /·					

Date:

## CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

## Health Care

Primary:	Phone #:	Male	Female
Alternate 1:	Phone #:	Male	Female
Alternate 2:	Phone #:	Male	Female
Would you want to be kept alive on li	fe support if you are in a persistent vegetative state?	Υ	N
State specific health care wishes if any	<i>и</i>		
	/.		
different from spouse:	to make your medical decisions for you if you cannot make Phone #:		
different from spouse: Primary:	Phone #:	Male	Female
different from spouse:		Male Male	Female Female
different from spouse: Primary: Alternate 1: Alternate 2:	Phone #: Phone #:	Male	Female
different from spouse: Primary: Alternate 1: Alternate 2:	Phone #: Phone #: Phone #:	Male Male Male	Female Female Female
different from spouse: Primary: Alternate 1: Alternate 2:	Phone #: Phone #: Phone #: fe support if you are in a persistent vegetative state?	Male Male Male	Female Female Female
different from spouse: Primary: Alternate 1: Alternate 2: Would you want to be kept alive on li	Phone #: Phone #: Phone #: fe support if you are in a persistent vegetative state?	Male Male Male	Female Female Female
different from spouse: Primary: Alternate 1: Alternate 2: Would you want to be kept alive on li	Phone #: Phone #: Phone #: fe support if you are in a persistent vegetative state?	Male Male Male	Female Female Female
different from spouse: Primary: Alternate 1: Alternate 2: Would you want to be kept alive on li	Phone #: Phone #: Phone #: fe support if you are in a persistent vegetative state?	Male Male Male	Female Female Female
different from spouse: Primary: Alternate 1: Alternate 2: Would you want to be kept alive on li	Phone #: Phone #: Phone #: fe support if you are in a persistent vegetative state?	Male Male Male	Female Female Female
different from spouse: Primary: Alternate 1: Alternate 2: Would you want to be kept alive on li	Phone #: Phone #: Phone #: fe support if you are in a persistent vegetative state?	Male Male Male	Female Female Female
different from spouse: Primary: Alternate 1: Alternate 2: Would you want to be kept alive on li	Phone #: Phone #: Phone #: fe support if you are in a persistent vegetative state?	Male Male Male	Female Female Female
different from spouse: Primary: Alternate 1: Alternate 2: Would you want to be kept alive on li	Phone #: Phone #: Phone #: fe support if you are in a persistent vegetative state?	Male Male Male	Female Female Female
different from spouse: Primary: Alternate 1: Alternate 2: Would you want to be kept alive on li	Phone #: Phone #: Phone #: fe support if you are in a persistent vegetative state?	Male Male Male	Female Female Female

## CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

CCET

Real Estate (Include Residence, Condos, Rentals, Land, Vacation Homes, Mobile Homes)  Worth \$  Owes \$  Joint Owner?    Address  Worth \$  Owes \$  Joint Owner?    Own a Business? Y NName:  Value (aprox)?    What type?  Sole Proprietorship?  LLC?  LLP?  Corporation?    Other Assets (aprox value):  Bank Accounts \$  Bonks \$  Mass \$    Bank Accounts \$  Stocks \$  Bonks \$  Mass \$    Mutual Funds \$  Retirement Plans \$  IRAs \$  Money Market Funds \$    All other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money  Worth \$  Worth \$    Qued to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth \$  Worth \$  Personal Property    Cars \$  Art \$  Jewelry \$  Collections \$  Musical Instruments \$  I////////////////////////////////////	Real Estate (Include Residence, Condos, Ren	tals Land Vacation Ho	mes Mohile Home	(s)				
Own a Business? YNName:  Value (aprox)?    What type?					Owes S	loint Owner?		
What type?    Sole Proprietorship?  LLC?  LLP?  Corporation?    Other Assets (aprox value):  Bank Accounts \$  CDs \$    Bank Accounts \$  Savings Accounts \$  CDs \$    Money Market Funds \$  Stocks \$  Bonds \$    Mutual Funds \$  Retirement Plans \$  IRAs \$    Annuities \$  Life Insurance \$  Other \$    ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth\$    Personal Property  R.V.s \$  Boats \$    Cars \$  R.V.s \$  Boats \$    Antiques \$  Art \$  Jewelry \$    Collections \$  Musical Instruments \$  Worth \$    All Other Valuable Items (list):  Worth \$  Image: Second S								
What type?    Sole Proprietorship?  LLC?  LLP?  Corporation?    Other Assets (aprox value):								
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What type?    Sole Proprietorship?  LLC?  LLP?  Corporation?    Other Assets (aprox value):	Own a Business? Y N Name:			Value (apro	x)5			
Sole Proprietorship?  LLC?  LLP?  Corporation?    Other Assets (aprox value):  Bank Accounts \$  CDs \$    Bank Accounts \$  Savings Accounts \$  CDs \$    Money Market Funds \$  Stocks \$  Bonds \$    Mutual Funds \$  Retirement Plans \$  IRAs \$    Annuities \$  Life Insurance \$  Other \$    ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth\$    Personal Property				Value (apro	~):			
Other Assets (aprox value):    Bank Accounts \$  Savings Accounts \$    Money Market Funds \$  Stocks \$    Mutual Funds \$  Retirement Plans \$    Annuities \$  Life Insurance \$    Annuities \$  Life Insurance \$    ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth \$    Personal Property  R.V.s \$  Boats \$    Antiques \$  Art \$  Jewelry \$    Collections \$  Musical Instruments \$  Worth \$    All Other Valuable Items (list):  Worth \$  Image: Since Sin			2011		Corporation?			
Bank Accounts \$  Savings Accounts \$  CDs \$    Money Market Funds \$  Stocks \$  Bonds \$    Mutual Funds \$  Retirement Plans \$  IRAs \$    Annuities \$  Life Insurance \$  Other \$    ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth \$    Personal Property			LLP!		Corporations			
Money Market Funds \$  Stocks \$  Bonds \$    Mutual Funds \$  Retirement Plans \$  IRAs \$    Annuities \$  Life Insurance \$  Other \$    ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth \$    Personal Property	Other Assets (aprox value):							
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Annuities \$  Life Insurance \$  Other \$    ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth\$    Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth\$    Personal Property  Image: State	Money Market Funds \$	Stocks \$		Bonds \$				
ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money  Worth\$    Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth\$    Personal Property  Image: Shares in the state in	Mutual Funds \$	Retirement Plans \$		IRAs \$				
Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth\$    Worth\$  Image: Second Property    Cars \$  R.V.s \$  Boats \$    Antiques \$  Art \$  Jewelry \$    Collections \$  Musical Instruments \$  Image: Second Property    All Other Valuable Items (list):  Worth \$  Image: Second Property    All Other Valuable Items (list):  Image: Second Property  Image: Second Property    Aprox. Total Value of Estate \$:  Image: Second Property  Image: Second Property	Annuities \$	Life Insurance \$		Other \$				
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Cars \$  R.V.s \$  Boats \$    Antiques \$  Art \$  Jewelry \$    Collections \$  Musical Instruments \$     All Other Valuable Items (list):  Worth \$     Aprox. Total Value of Estate \$:	Owed to You; LLC, LLP, Partnerships; Joint	Tenancies; Pension; etc	:		WorthŞ			
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All Other Valuable Items (list):  Worth \$    Worth \$  Image: Second Secon			¢	Jewelry \$				
Aprox. Total Value of Estate \$:		wusical instruments	Ş					
	All Other Valuable Items (list):		Worth \$					
	Aprox. Total Value of Estate S:							
Additional information you wish to include (you may attach pages if necessary):								
	Additional information you wish to include (	you may attach pages	if necessary):					
	;							

HOW DID YOU FIND US? REFERRAL	WEBSITE	YELP	PRINT AD	OTHER?	 
If Referred, by whom?					