

ESTATE PLANNING QUESTIONNAIRE

PERSONAL AND FAMILY DATA

Date: _____

	Husband	Wife
Name		
Date of Birth		
Citizenship		
Social Security No.		
Occupation		
Business Name		
Business Address & Phone Number		
Cell Phone Number		
E-mail Address		
Cemetery Lot		
Do You Have:		
Will	Yes [] No []	Yes [] No []
Power of Attorney	Yes [] No []	Yes [] No []
Advance Medical Directive	Yes [] No []	Yes [] No []
	If Yes to any, please provide copies	

Home Address	
Home Phone Number	
Date & Place of Marriage	
Marital Agreement	Yes [] No []
Safe Deposit Box Location	

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Prior Marriages (If Applicable)

	Husband	Wife
Prior Spouse		
Children of Prior Marriage		
Date of Marriage		
Place		
Date of Dissolution		

Children (Including those legally adopted):

Name	Date of Birth	Marital Status	Spouse's Name

Deceased Children and Their Children:

Name of Deceased Child	Name of Deceased Child's Children

Grandchildren (Including those legally adopted):

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Name	Birthday	Marital Status	Spouse's Name

Living Parents:

Husband	Wife

Brothers and Sisters:

Husband	Wife

Does the Husband or the Wife:

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- | | |
|---|--|
| Have any child or grandchild with a disability? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| Expect to inherit something from parents or others? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| Expect to receive benefits from a retirement plan? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| Expect to receive large gifts from parents or others? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| Have beneficial interests in trusts? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| Are you an owner in a small business? | Yes <input type="checkbox"/> No <input type="checkbox"/> |

Important Documents to Be Reviewed:

- Existing Wills, Trusts, Powers of Attorney
- Retirement Assets' Beneficiary Designation
- Life Insurance Policies' Beneficiary Designations

FUNERAL PROVISIONS:

Do you have any special directions concerning your bodily remains, funeral and final resting place?

WILL PROVISIONS DESIRED BY CLIENT

General Disposition Intentions:

Most married couples wish the bulk of their property to pass to their spouse for his or her lifetime and then to pass to their children upon the death of the surviving spouse. The property can be held in trust until the children reach a certain age, to be used for their support, health & education. Couples without children may wish to have their assets ultimately pass to friends, relatives or to charity. Please review the Estate Planning Information Sheets on our website at www.RutledgeAitken.com for more discussion on estate planning.

Your Preferences: _____

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Gifts of Specific Property or Amounts:

If you want to ensure certain items of your tangible personal property and/or sums of money go to specific individuals, that should be specified in your Will. (This would include pets.) _____

Ultimate Beneficiary: When all of the named beneficiaries predecease the surviving spouse (e.g. all children, grandchildren, and other descendants are predeceased) most couple give one-half of their assets to the Husband's other family members (e.g. parents, siblings, nieces, nephews, etc.) and one-half to the Wife's other family members. Alternatively, some individuals prefer to give all or a portions of their assets to charity. **Your Preferences:** _____

Personal Representative/Executor:

It is typical for the surviving spouse to serve as Personal Representative. If he or she does not wish to serve alone, another responsible person can serve with him or her.

Initial Personal Representative(s):	Relationship to You:

Alternate Personal Representative(s):	Relationship to You:

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Trustees for Trust Under Will (if any):

Typically, a disinterested party is appointed as co-trustee in order to make discretionary decisions regarding distributions without incurring adverse tax consequences. The surviving spouse or other family member may also serve, but would have limited authority.

Initial Trustee(s):	Relationship to Testator:
Successor Trustee(s):	Relationship to Testator:

Guardians for Minor Children (if any):

Until minor children reach age 18, they must have a guardian appointed with respect to both their person and any property they may own individually. The surviving parent is automatically guardian of any minor children. If neither parent is living, some other person, preferably a related couple, should be named in the guardian of any minor children. The couple can serve individually or jointly. Successors to the first named guardians should also be considered.

Guardian(s):	Relationship to You:
Successor Guardian(s):	Relationship to You:

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ADVANCE MEDICAL DIRECTIVE: An advance medical directive authorizes another person to make decisions for you regarding your health care in the event you are incapable of making such decisions.

Initial Decision Maker(s):	Cell Phone Number	Relationship to You:
Successor Decision Maker (s):	Cell Phone Number	Relationship to You:

The Advance Direct also sets forth end of life decisions when you cannot make medical decisions for yourself, such as when you are in a coma or other persistent vegetative state and there is no hope of recovery. You can direct what are your wishes. This is similar to a Living Will.

Your Preferences: _____

GENERAL POWER OF ATTORNEY: A power of attorney is a document by which one person (called the principal) designates another person to act as his or her agent for financial matters. It also names the guardian for the principal if the principal becomes disabled or incapacitated.

Initial Agent(s):	Relationship to Principal:
Successor Agent (s):	Relationship to Principal:

Anything else we should know? _____

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