

ESTATE PLANNING QUESTIONNAIRE

WHAT WOULD YOU LIKE TO NAME YOUR TRUST? _____

Name as normally signed: _____

Name on ID: _____

Mobile Number	Email	Home Number

Name as normally signed: _____

Name on ID: _____

Mobile Number	Email	

Residential Address, City, State, Zip Code			
Mailing Address (If different than street address)			

CHILDREN

Name	Minor or Adult?	City/State of Residence	Child of:

ASSET INFORMATION

PROPERTY: While married, any items you purchase are generally considered "community property" which belongs to both spouses equally. However, items accumulated before marriage, items that are inherited, or items that you agree in writing belong to one spouse alone are generally considered separate property. A Trust can be set up to distribute any separate property assets differently from your community property assets.

If any of the following is separate property, please indicate the owner of the asset.

- Real Property 1** _____
- Real Property 2** _____
- Real Property 3** _____

Accounts:

Bank: _____ Acct No. _____
 checking savings CD money market Other _____

Bank: _____ Acct No. _____
 checking savings CD money market Other _____

Bank: _____ Acct No. _____
 checking savings CD money market Other _____

Bank: _____ Acct No. _____
 checking savings CD money market Other _____

Retirement Plans:

Held at: _____ Acct No. _____ Owner: Husband Wife
 IRA 401K Annuity Pension Other _____ (circle one)

Held at: _____ Acct No. _____ Owner: Husband Wife
 IRA 401K Annuity Pension Other _____ (circle one)

Held at: _____ Acct No. _____ Owner: Husband Wife
 IRA 401K Annuity Pension Other _____ (circle one)

Held at: _____ Acct No. _____ Owner: Husband Wife
 IRA 401K Annuity Pension Other _____ (circle one)

Life Insurance, Art, Collectibles or Other Valuables

Description: _____ Value\$ _____

Description: _____ Value\$ _____

Description: _____ Value\$ _____

SUCCESSOR TRUSTEES/EXECUTORS/AGENTS

Please choose **Successors** for when you ***and*** your spouse are no longer able to handle your **financial** affairs.

Complete Name and Relationship SUCCESSOR #1	Complete Name and Relationship of SUCCESSOR #2
Address	Address
Telephone Numbers (Home & Mobile)	Telephone Numbers (Home & Mobile)
Email Address	Email Address
Complete Name and Relationship of SUCCESSOR #3	Complete Name and Relationship of SUCCESSOR #4
Address	Address
Telephone Numbers (Home & Mobile)	Telephone Numbers (Home & Mobile)
Email Address	Email Address

DISTRIBUTION OF ASSETS

Yes No Distribute all assets to children in equal shares, if living, outright; otherwise, to deceased child's children (your grandchildren), in equal shares via the Grandchildren's Trust with payout at 25.

OR TRUST TO BE DIVIDED INTO PERCENTAGE SHARES AS FOLLOWS

Percentage Amount	Name/Relationship	City/State

WHO WILL LOOK AFTER MY CHILDREN?

A guardian raises your minor children in the event you are unable. This includes choosing schools, medical providers, and all other everyday choices concerning your child's care as well as communicating the financial needs to the Trustee in charge of your Trust (**Note that the Guardian need not be the same person as the Trustees/Executors/Agents**).

_____ #1 Guardian _____ #2 Guardian

POWER OF ATTORNEY FOR HEALTH CARE

This form instructs your Agent about your wishes regarding **life support, organ donation, and power to deal with funeral homes**, etc. These individuals **need not be the same person as the Trustees, Executors, Agents** (unless you would like them to be) Your spouse is your First Agent, **if they are not able to serve**, please chose your Successor below.

Spouse No. 1: Autopsy is allowed Donation of Organs is allowed Disposition by Burial Cremation Other:

Complete Name and Relationship of SUCCESSOR #1	Complete Name and Relationship of SUCCESSOR #2
Address	Address
Telephone Numbers (Home & Mobile)	Telephone Numbers (Home & Mobile)

Spouse No. 2: Autopsy is allowed Donation of Organs is allowed Disposition by Burial Cremation Other:

Complete Name and Relationship of SUCCESSOR #1	Complete Name and Relationship of SUCCESSOR #2
Address	Address
Telephone Numbers (Home & Mobile)	Telephone Numbers (Home & Mobile)