

## ESTATE PLANNING QUESTIONNAIRE

### PERSONAL INFORMATION

#### CLIENT 1:

Full name: \_\_\_\_\_  
First M. I. Last

Any other name(s) used: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

U. S. citizen?  Yes  No If "no," country of citizenship: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Marital Status (Circle One):            Single            Married            Divorced

If Married, Date and Place of Marriage: \_\_\_\_\_

#### CLIENT 2 [SPOUSE OF CLIENT 1]:

Full name: \_\_\_\_\_  
First M. I. Last

Any other name(s) used: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

U. S. citizen?  Yes  No If "no," country of citizenship: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

#### ADDRESS:

Residence Address: \_\_\_\_\_  
Street Address

\_\_\_\_\_ City State Zip

Do You (Circle One): Own / Rent

**OTHER PROPERTIES YOU OWN OR IN WHICH YOU HAVE AN INTEREST.** Please provide the complete address(es) for each additional property you own (either in whole or jointly with someone else), including Timeshares.

(1) \_\_\_\_\_  
Street Address

\_\_\_\_\_  
City State Zip

(2) \_\_\_\_\_  
Street Address

\_\_\_\_\_  
City State Zip

(3) \_\_\_\_\_  
Street Address

\_\_\_\_\_  
City State Zip

**PLEASE PROVIDE A COPY OF THE DEED (NOT “DEED OF TRUST”) FOR EACH PIECE OF REAL PROPERTY IN WHICH YOU HOLD AN INTEREST (i.e. residence, rental properties, or timeshares). A “Deed” is the document recorded (at the time the property is purchased) identifying the new owner. A person owns property even if there are mortgages on that property; the lender merely holds a lien against the property. A “Deed of Trust” is the mortgage lien against the property.**

**PRIOR MARRIAGE(S)**

**CLIENT 1:**

Name of Former Spouse: \_\_\_\_\_  
First M. I. Last

Manner of Termination (Circle One): Divorce / Death

Date of Divorce/Death: \_\_\_\_\_

**CLIENT 2:**

Name of Former Spouse: \_\_\_\_\_  
First M. I. Last

Manner of Termination (Circle One): Divorce / Death

Date of Divorce/Death: \_\_\_\_\_





















**DISTRIBUTION OF YOUR ESTATE**

**DISTRIBUTION OF PROPERTY UPON DEATH. What is your desired disposition of your property on your death and/or your spouse's death?**

If married:

All to your spouse on death  Yes  No

To your children in equal shares on your spouse's death  Yes  No

If not married:

To your children in equal shares  Yes  No

If neither of the above apply, to whom do you wish to leave your property, and in what proportions? Please list full names and addresses.

1. Name: \_\_\_\_\_

Proportion: \_\_\_\_\_

2. Name: \_\_\_\_\_

Proportion: \_\_\_\_\_

3. Name: \_\_\_\_\_

Proportion: \_\_\_\_\_

**CHILDREN'S AGES AND SHARES FOR DISTRIBUTION(S).**

When should your children receive their distributions?

Outright on your death:  Yes  No

If not outright, please provide age(s) of distribution and the fractional or percentage interest of each child's share to be distributed at specified age(s), unless otherwise specified, the distribution you choose will apply to all children:

\_\_\_\_\_  
Age                      Amount (i.e. 100%, 50%, etc.)

\_\_\_\_\_  
Age                      Amount (i.e. 100%, 50%, etc.)

\_\_\_\_\_  
Age                      Amount (i.e. 100%, 50%, etc.)

If a child predeceases you:

Would you like their issue (your grandchildren) to receive their distribution?  Yes  No

**SIMULTANEOUS DEATH.** Desired disposition of estate in the event you, your spouse and your children die simultaneously:

- EXAMPLES: 1) Your heirs (determined by California law)  
2) Specific named individuals (other than your heirs generally)  
3) A specific charity (i.e. Red Cross, Boy's Town, Girl Scouts)

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

**SPECIFIC BEQUESTS.**

List specific bequests you wish to make, if any, indicating what and to whom. In the event the individual or organization does not survive, please specify if the gift will be distributed to that individual's issue, to someone else, or if the gift will lapse and become a part of the residue of your estate.

- EXAMPLES: 1) Diamond and ruby cocktail to John Doe, my friend, 1234 Easy Street, Avocado, California. If John Doe is not living, to his issue by right of representation.  
2) The sum of \$1,000 to Boy Scouts of America, c/o National Headquarters, 321 Right Path, Eagletown, New York, or to its successor. If Boy Scouts of America or its successor is not an organization at the time of my death, this gift shall lapse.

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

**SAFETY DEPOSIT BOXES**

1. Name and address of bank: \_\_\_\_\_

Full name(s) of person(s) entitled to access: \_\_\_\_\_