

SIMPLIFIED CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

Name: _____ Date of Birth: _____

Spouse: _____ Date of Birth: _____

Occupation: _____ State of Residence: _____

Address: _____

Telephone Number: _____ Dates at Location: _____

Alternate Address: _____

Telephone Number: _____ Dates at Location: _____

Child(ren)	Spouses	Grandchildren
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Any special needs for your children or grandchildren? _____

Do you have a Will? _____ Date of Will: _____ State Executed: _____

Do you have a Marital Trust of Credit Shelter Trust? _____

Do you have a Revocable Living Trust? _____

Do you have an Irrevocable Life Insurance Trust? _____

(Bring copies of all Wills and/or Trusts if available)

Are you making any annual gifts? _____ How much annually? _____

Have you or your spouse gifted any of your lifetime exemptions? (\$1,000,000) _____

Have you or do you want to make any charitable bequests? _____

Who is the Beneficiary of your Retirement Plan or IRA? _____

Any history of health problems? _____ Spouse? _____

Have you ever had a prior marriage? _____

Current annual income: _____ Annual income needed: _____

Estimated income taxes: _____ Federal Income Tax Bracket: _____

Current Life Insurance:

Company	Death Benefit	Insured	Beneficiary	Type
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

(Attach a Financial Statement if Available)

Home	_____	_____ %	Liabilities
Real Estate	_____	_____ %	
Business	_____	_____ %	
Stocks	_____	_____ %	
Mutual Funds	_____	_____ %	
Tax Free Bonds	_____	_____ %	
Money Market	_____	_____ %	
Retirement Plans	_____	_____ %	
CD's	_____	_____ %	
Annuities	_____	_____ %	
Other	_____	_____ %	Net Worth

Do you own any highly appreciated assets: _____

Is there at least \$1,500,000 in each spouse's name? _____

What was the approximate size of your estate 5 years ago? _____ 10 years ago? _____

Which of the above assets do you wish to have your children liquidate to pay your estate taxes?

Why have you built your estate?

What are your estate planning objectives?

Attorney's Name: _____

CPA's Name: _____

Life Insurance Agent: _____

Stockbroker: _____

Programs that interest me:

- Family Limited Partnership
- Qualified Personal Residence Trust
- Charitable Remainder Trust
- Irrevocable Life Insurance Trust
- Annuity Review
- Irrevocable Living Trust
- Generation Skipping Dynasty Trust
- 2nd to Die Life Insurance
- Individual Insurance
- Municipal Bond Alternative
- Long Term Care Analysis
- Charitable IRA Plan
- Gifting Programs
- Roth IRA Conversion
- Wills & Trusts Review
- IRA Alternative Plan
- Insurance Review & Update
- Investment Review
- Optimum IRA Arrangement