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COUNSELORS AT LAW

Estate Planning Questionnaire

Personal Information

Date: ____________________

Client #1	Client #2
Name: ____________________	Name: ____________________
Address: ____________________	Address: ____________________
____________________	____________________
Personal Email: ____________________	Personal Email: ____________________
Tel. ____________________	Tel. ____________________
D.O.B. ____________________	D.O.B. ____________________
SS#: ____________________	SS#: ____________________
Employer: ____________________	Employer: ____________________
Employer Address: ____________________	Employer Address: ____________________
____________________	____________________
Work Email: ____________________	Work Email: ____________________
Work Tel: ____________________	Work Tel: ____________________
U.S. Citizen? ☐ Y ☐ N	U.S. Citizen? ☐ Y ☐ N

Children

Name	Address	DOB	SS #

Special Circumstances (i.e., second marriage, divorce, prenuptial agreement, adoptions, family member with special needs):

Estimated Asset Valuations			
Asset	Client #1	Client #2	Joint
Cash and Equivalents (from Schedule 1)			
Stocks (from Schedule 2)			
Bonds (from Schedule 3)			
Residence (Fair Market Value)			
Other Realty Location:			
Tangible Personal Property Including Antiques, Furniture, Automobiles			
Life Insurance (from Schedule 4)			
Retirement Assets (from Schedule 5)			
Business Interest Include type (e.g., sole proprietorship, S Corp., C Corp.)			
Other (e.g., Deferred Compensation, Joint Accounts with children, UGMA Accounts, 529 Accounts, etc.)			
Subtotal of Assets			
Liabilities (from Schedule 6)			
TOTAL (Net)			

1. Potential Inheritance? ☐ Y ☐ N

Safe Deposit Box? ☐ Y ☐ N

Location: ______________________

____

2. Beneficiary of any trust ☐ Y ☐ N

3. Beneficiary of any power(s) of appointment? ☐ Y ☐ N

If yes to 2 or 3 above, describe: ______________________

____

Schedule 1: Cash and Equivalents

Checking, Savings, Money Markets and Treasury Bills

Client #1:

Custodian	Description	Current Value

Client #2:

Custodian	Description	Current Value

Joint:

Custodian	Description	Current Value

Schedule 2: Stocks

Including Equity Mutual Funds (list brokerage, custodian or advisor only)

Client #1:

Custodian	Description	Current Value

Client #2:

Custodian	Description	Current Value

Joint:

Custodian	Description	Current Value

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Schedule 3: Bonds

Including Bond Funds, Treasury, Municipal and Series E or H

Client #1:

Custodian	Description	Current Value

Client #2:

Custodian	Description	Current Value

Joint:

Custodian	Description	Current Value

Schedule 4: Life Insurance

On Life of Client #1:

Company	Owner	Group or Individual	Primary Beneficiary	Annual Premium	Cash Value	Face Value

On Life of Client #2:

Company	Owner	Group or Individual	Primary Beneficiary	Annual Premium	Cash Value	Face Value

On Life of Client #1 and Client #2:

Company	Owner	Group or Individual	Primary Beneficiary	Annual Premium	Cash Value	Face Value

Schedule 5: Retirement Assets

Including IRA, 401k, 403b, Pension, Profit Sharing

Client #1:

Custodian	Description	Current Value	Primary Beneficiary

Client #2:

Custodian	Description	Current Value	Primary Beneficiary

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Schedule 6: Liabilities

Including Mortgages, Notes, Lines of Credit

Client #1:

Description	Type	Owed To	Amount Owed	Monthly Pmt.	Int. Rate

Client #2:

Description	Type	Owed To	Amount Owed	Monthly Pmt.	Int. Rate

Joint:

Description	Type	Owed To	Amount Owed	Monthly Pmt.	Int. Rate