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# 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