

## E-mail Client Questionnaire

Your Full Legal Name & birth date: \_\_\_\_\_

Spouse/Partner & birth date: \_\_\_\_\_

Permanent Address: \_\_\_\_\_

County: \_\_\_\_\_ Email: \_\_\_\_\_

Citizenship: \_\_\_\_\_ Marital Status: \_\_\_\_\_

Number & full name & birth date of children:

_____	_____	_____
_____	_____	_____
_____	_____	_____

Are any more anticipated? \_\_\_\_\_

Stepchildren? \_\_\_\_\_

Grandchildren? \_\_\_\_\_

Have you ever signed a community property agreement? \_\_\_\_\_

Approximate Value of Assets by Major Category:

1. Real estate: (list fair market value and any mortgages) \_\_\_\_\_

2. Retirement Accounts (IRA, 401k, etc) and who are primary/contingent beneficiaries:

\_\_\_\_\_

3. Cash/checking/savings/CDS/savings bonds: \_\_\_\_\_

4. Stocks/Bonds, Brokerage Accts, Mutual Funds (not retirement) and how account is titled (e.g. whether joint tenancy with right of survivorship, tenants in common, or payable on death):

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5. Life Insurance: (type, amount payable at death, beneficiaries): \_\_\_\_\_

6. Notes or Annuities payable to you: \_\_\_\_\_

7. Personal Property (estimate of garage sale value of Furniture, furnishings, jewelry, cars, collectibles, art, etc): \_\_\_\_\_

8. Other assets? \_\_\_\_\_

9. Potential Inheritance? \_\_\_\_\_

10. Any liabilities/debts other than mortgages listed above? \_\_\_\_\_

Have you ever made any gifts larger than \$13,000 per person per year? If so, list:

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Would you like to have the ability to make a list of personal property and who gets it upon your death? (If yes, your Will can refer to a separate list which you can prepare at any time. If no, it will all go to whomever you name in the Will):

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Other than what is on a personal property list, who do you want your property to go to when you die (include middle name or initial if possible and relationship of person to you)?

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If any of those people die before you, to whom should their share go?

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If any of these people are minors, at what age should they have control of their share?

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Who should hold the property for minors in a trust until they turn that age?

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For minor children, whom do you want to name as guardian?

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As alternate guardian?

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As Trustee of children's trust?

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At what age(s) should children receive trust funds outright?

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Who should serve as Personal Representative (Executor?) of your estate?

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As alternate Personal Representative?

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Who should serve as Power of Attorney?

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Alternate Power of Attorney?

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The addresses of persons to serve under Power of Attorney:

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Do you want a health care directive (living will) to refuse artificial life support if it's hopeless?

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