

ESTATE PLANNING QUESTIONNAIRE

Wife's Information

Name: _____
Additional/Former Names: _____

U.S. Citizen: ____ Yes ____ No
Home Address (include county): _____

Home Phone: _____
Work Phone: _____
Mobile Phone: _____
Email Address: _____

Executor

Initial Executor: _____
1st successor executor: _____
2nd successor executor: _____
3rd successor executor: _____

Medical P.O.A.

Initial agent: _____
1st successor agent: _____
2nd successor agent: _____

Statutory P.O.A.

Initial agent: _____
1st successor agent: _____
2nd successor agent: _____
3rd successor agent: _____

Trustee

Initial trustee: _____
1st successor trustee: _____
2nd successor trustee: _____
3rd successor trustee: _____

Guardian of Minor Children:

Initial guardian: _____
1st alternate guardian: _____
2nd alternate guardian: _____
3rd alternate guardian: _____

Husband's Information

Name: _____
Additional/Former Names: _____

U.S. Citizen: ____ Yes ____ No
Home Address, if different (include county): _____

Home Phone: _____
Work Phone: _____
Mobile Phone: _____
Email Address: _____

Executor

Initial Executor: _____
1st successor executor: _____
2nd successor executor: _____
3rd successor executor: _____

Medical P.O.A.

Initial agent: _____
1st successor agent: _____
2nd successor agent: _____

Statutory P.O.A.

Initial agent: _____
1st successor agent: _____
2nd successor agent: _____
3rd successor agent: _____

Trustee

Initial trustee: _____
1st successor trustee: _____
2nd successor trustee: _____
3rd successor trustee: _____

Guardian of Minor Children:

Initial guardian: _____
1st alternate guardian: _____
2nd alternate guardian: _____
3rd alternate guardian: _____

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CHILDREN:

Please complete the following for any other person named in this questionnaire:

Name: _____

Name: _____

Address (include county): _____

Address (include county): _____

Home Phone: _____

Home Phone: _____

Work Phone: _____

Work Phone: _____

Mobile Phone: _____

Mobile Phone: _____

Date of Birth: _____

Child of Husband _____ Wife _____ Both _____

Name: _____

Name: _____

Address (include county): _____

Address (include county): _____

Home Phone: _____

Home Phone: _____

Work Phone: _____

Work Phone: _____

Mobile Phone: _____

Mobile Phone: _____

Date of Birth: _____

Child of Husband _____ Wife _____ Both _____

Name: _____

Name: _____

Address (include county): _____

Address (include county): _____

Home Phone: _____

Home Phone: _____

Work Phone: _____

Work Phone: _____

Mobile Phone: _____

Mobile Phone: _____

Date of Birth: _____

Child of Husband _____ Wife _____ Both _____

Name: _____

Name: _____

Address (include county): _____

Address (include county): _____

Home Phone: _____

Home Phone: _____

Work Phone: _____

Work Phone: _____

Mobile Phone: _____

Mobile Phone: _____

Date of Birth: _____

Child of Husband _____ Wife _____ Both _____

Name: _____

Name: _____

Address (include county): _____

Address (include county): _____

Home Phone: _____

Home Phone: _____

Work Phone: _____

Work Phone: _____

Mobile Phone: _____

Mobile Phone: _____

Date of Birth: _____

Child of Husband _____ Wife _____ Both _____