

**ESTATE PLANNING QUESTIONNAIRE**

**Contact Information**

Name: \_\_\_\_\_

Additional/Former Names: \_\_\_\_\_

U.S. Citizen: \_\_\_ Yes \_\_\_ No

Home Address (include county): \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_

**Executor**

Initial Executor: \_\_\_\_\_

1<sup>st</sup> successor executor: \_\_\_\_\_

2<sup>nd</sup> successor executor: \_\_\_\_\_

3<sup>rd</sup> successor executor: \_\_\_\_\_

**Medical Power of Attorney**

Initial agent: \_\_\_\_\_

1<sup>st</sup> successor agent: \_\_\_\_\_

2<sup>nd</sup> successor agent: \_\_\_\_\_

**Statutory Power of Attorney (financial)**

Initial agent: \_\_\_\_\_

1<sup>st</sup> successor agent: \_\_\_\_\_

2<sup>nd</sup> successor agent: \_\_\_\_\_

3<sup>rd</sup> successor agent: \_\_\_\_\_

**Trustee**

Initial trustee: \_\_\_\_\_

1<sup>st</sup> successor trustee: \_\_\_\_\_

2<sup>nd</sup> successor trustee: \_\_\_\_\_

3<sup>rd</sup> successor trustee: \_\_\_\_\_

**Guardian of (Minor Children) or (Self):**

**Person**

**Estate**

Initial guardian: \_\_\_\_\_

1<sup>st</sup> alternate guardian: \_\_\_\_\_

2<sup>nd</sup> alternate guardian: \_\_\_\_\_

3<sup>rd</sup> alternate guardian: \_\_\_\_\_

Initial guardian: \_\_\_\_\_

1<sup>st</sup> alternate guardian: \_\_\_\_\_

2<sup>nd</sup> alternate guardian: \_\_\_\_\_

3<sup>rd</sup> alternate guardian: \_\_\_\_\_

**ESTATE PLANNING QUESTIONNAIRE**

**CHILDREN IF ANY:**

**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: \_\_\_\_\_

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 \_\_\_\_\_