



Estate Planning Questionnaire

How did you hear about us?		
I. GENERAL INFORMATION		
	Husband	Wife
Full name		
Other names known by		
Date of birth		
Social Security number		
Home telephone number		
Mobile telephone number		
Work telephone number		
Home mailing address		
County of Residence		
E-mail address		
Have you made a will, signed a trust, powers of attorney, or other estate planning document before?*		
Have you entered into a pre- or postnuptial agreement?*		
Are you married?		
Have you been married before?		
Do you anticipate receiving an inheritance?		
Approximate size?		
Are you a trust beneficiary?*		
Do you own property located in another state?*		
Would you like your executed documents to be maintained in the Grissom Law, LLC safe?		
* If you answered "yes" to any of these questions, please bring a copy of the prior will, nuptial agreement, separation agreement, decree of dissolution, trust agreement, or other applicable document with you to our initial meeting.		

Children Full Names	Sex (Male/Female)	Date of Birth	H/W/Both

II. BENEFICIARIES

When we meet to discuss your estate planning, I will review with you in detail the various ways property can be distributed upon your death. For now, however, please list the names of the person, groups of persons, or entities (including charitable organizations) that you would like to benefit from your estate upon your death.

Husband	Wife

Specific beneficiaries. List the persons or entities to which you wish to make gifts of cash or real property upon your death. (We will include a memo provision for personal property.)

Gift	Husband	Wife

Residuary beneficiaries. List the persons or entities to which you wish to leave the remainder of your estate after specific bequests are made.

	Husband	Wife

III. FIDUCIARIES

In the course of your estate planning, you will be required to select fiduciaries, which are individuals or entities entrusted to act on your behalf in some capacity, such as to administer assets of your estate upon your death, to administer trust assets on behalf of beneficiaries, to make health decisions for you if you are unable to make those decisions yourself, or to take care of your minor children in the event that you are unable to do so. Below, I have asked you to supply names and addresses for the persons whom you have selected for such fiduciary positions. In addition, please list the appointed fiduciary's relationship to you. When choosing a fiduciary, please note that it is often appropriate for a surviving spouse to act in such capacity and that you can name more than one person to act as a fiduciary. If you are having trouble choosing fiduciaries, feel free to skip over this section. I will go over each fiduciary position in detail when we meet to discuss your estate planning.

Personal representative: Often called an "executor," a personal representative has broad powers to administer and distribute your property after your death. Please list their names and City/State.

	Husband	Wife
Personal Representative		
Successor Personal Representative		
Second Successor Personal Representative		

Trustee: A trustee is a person or entity who administers and distributes property held in a trust. A trust may be established under your will for a variety of purposes such as for tax purposes or for the purpose of administering property that would otherwise pass outright to minor children. Please list their names and City/State.

	Husband	Wife
Trustee		
Successor Trustee		

Guardian: A guardian is a court approved individual who makes decisions regarding a minor child's support, care, education, health, and welfare. Please list their names and City/State.

Husband		Wife	
Guardian Name:		Guardian Name:	
Address:		Address:	
Successor Guardian Name:		Successor Guardian Name:	
Address:		Address:	

Agent with financial power of attorney: An agent with financial power of attorney is a person authorized to make financial decisions for you during your life. The power of attorney document can authorize your agent to assist you in making those decisions for yourself while you have capacity or to make those decisions for you in the event that you are incapacitated.

Husband		Wife	
Agent	Name:	Name:	
	Address:	Address:	
	Phone:	Phone:	
Successor Agent	Name:	Name:	
	Address:	Address:	
	Phone:	Phone:	

Agent with medical power of attorney: An agent with medical power of attorney is a person authorized to make medical and healthcare decisions for you during your life. The power of attorney document can authorize your agent to assist you in making those decisions for you in the event that you are incapacitated.

Husband		Wife
Agent	Name: Address: Home Phone: Work Phone: Mobile Phone:	Name: Address: Home Phone: Work Phone: Mobile Phone:
Successor Agent	Name: Address: Home Phone: Work Phone: Mobile Phone:	Name: Address: Home Phone: Work Phone: Mobile Phone:
2 nd Successor Agent	Name: Address: Home Phone: Work Phone: Mobile Phone:	Name: Address: Home Phone: Work Phone: Mobile Phone:

IV. ASSETS

Please list the value of the following assets owned by you, by your partner, or jointly. It is not necessary to provide the exact value of each asset; an approximation or average balance is sufficient. If you have any questions about the information requested below, please feel free to make a note and I will discuss it with you in detail when we meet.

	Husband	Wife	Joint
Cash			
Checking Accounts			
Savings Accounts			
CD's			

Money Market Funds			
Stocks and Stock Funds			
Taxable Bonds / Bond Funds			
Retirement Funds Beneficiaries			
401K Plan Beneficiaries			
IRA's Beneficiaries			
Keoghs Beneficiaries			
Annuities Beneficiaries			
Primary Residence			
Secondary Residence			
Other Real Estate			
Copyrights, Royalties, Patents, Trademarks, and other Tangible Rights			
Life Insurance Beneficiaries			
Long Term Care Insurance			
Motor Vehicles			
Boats			
Aircrafts			
Sports and Hobby Equipment			
Household Possessions (Antique, artwork, jewelry, collections, etc.)			
Interests in Trusts			
Family Business			
Other Business Interests			
Property subject to a power of appointment			
TOTAL ASSETS			

V. Liabilities			
Real Estate Mortgage			
Auto Loans			
Business Loans			
Educational Loans			
Other Long Term Debt			
Personal Loans			
Other Short-term debt			

Questions for the Attorney:

