



Estate Planning Questionnaire

How did you hear about us?	
I. GENERAL INFORMATION	
	About You
Preferred Salutation (Dr., Mrs., Mr.)	
Full legal name	
Other names known by	
Preferred Name	
Date of birth	
Social Security number	
Home telephone number	
Mobile telephone number	
Work telephone number	
Home mailing address	
County of Georgia Residence	
Citizen of U.S. (Yes/No)	
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? If so, name of your spouse	
Have you been married before?	

<p>Do you have any current serious health concerns? If yes, what are they?</p>	
<p>Capacity (If Applicable). Do you have concerns about your own capacity, now or in the near future? Do you feel like other family members have concerns about your capacity?</p>	
<p>Do you have any upcoming surgeries, medical problems or travel? If so, on what date? Do you wish to have your documents in place prior to the procedure?</p>	
<p>Do you anticipate receiving an inheritance?</p>	
<p>Approximate size?</p>	
<p>Are you a trust beneficiary?*</p>	
<p>Name, Email & Phone Number for Financial Planner</p>	
<p>Do you own property located in another state? Add address (please bring deed to meeting)</p>	
<p>Would you like your executed documents to be maintained in the Grissom Law, LLC safe?</p>	
<p>Would you like an electronic copy of your executed documents?</p>	
<p>* 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.</p>	

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.

Who do you wish to leave your estate to (Name, Relationship, Charities)?

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.)

Name	Gift

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

Name	Portion of your Estate to leave to this individual

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.

	Name
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.

	Name
Trustee	
Successor Trustee	
Second Successor Trustee	
Third 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.

Guardian Name:

Address:

Mobile Phone Number:

Relationship:

Successor Guardian Name:

Address:

Mobile Phone Number:

Relationship:

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.

Agent

Successor Agent

Second Successor Agent

Third Successor Agent

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.

Agent	
Successor Agent	
Second Successor Agent	
Third Successor Agent	

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.

	Value	JOINT with anyone or NAMED Beneficiary?	Name of Financial Institution
Cash			
Checking Accounts			
Savings Accounts			
CD's			
Money Market Funds			
Stocks and Stock Funds			
Taxable Bonds / Bond Funds			
401K			
IRA			
Keoghs			
Annuities			
Life Insurance Value			
Long Term Care Insurance			
Motor Vehicles - Value			
Boats - Value			
Aircrafts-Value			
Interests in Trusts			
Copyrights, Royalties, Patents, Trademarks, and other Tangible Rights			
Personal Property (Antique, artwork, jewelry, collections, etc.)			
Property subject to a power of appointment (whose & amount)			

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:

The information above are true and correct to the best of my knowledge.

Date: _____

Signature: _____

