GRISSOM LAW, LLC

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Estate Planning Questionnaire

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How did you hear about us?	
I. GENERAL INFORMATION	
	About You
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?*	
Name, Email & Phone Number for Financial Planner	
Do you own property located in another state?*	
Would you like your executed documents to be maintained in the Grissom Law, LLC safe?	
Would you like an electronic copy of your executed documents?	

^{*} 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	Male or Female	Date of Birth	Husband's Wife's Both	Single or Married
Grandchildren Full Names	Sex (Male/Female)	Date of Birth	Child's Parents	Single or Married

II. BENEFICIARIES	
property can be distributed upon	tate planning, I will review with you in detail the various ways your death. For now, however, please list the names of the person, cluding charitable organizations) that you would like to benefit from
Who do you wish to leave your estate to?	
counte to.	
	rsons or entities to which you wish to make gifts of cash or real ill 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		
or entities entrusted to act on you estate upon your death, to admin for you if you are unable to make the event that you are unable to the persons whom you have select appointed fiduciary's relationship appropriate for a surviving spous person to act as a fiduciary. If you section. I will go over each fiduci	ning, you will be required to select fiduciaries, which are individuals are behalf in some capacity, such as to administer assets of your ister trust assets on behalf of beneficiaries, to make health decisions those decisions yourself, or to take care of your minor children in do so. Below, I have asked you to supply names and addresses for sted for such fiduciary positions. In addition, please list the to you. When choosing a fiduciary, please note that it is often to act in such capacity and that you can name more than one are having trouble choosing fiduciaries, feel free to skip over this ary position in detail when we meet to discuss your estate planning.	
<u>Personal representative</u> : 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, Address, Phone Number	
Personal Representative		
Successor Personal Representative		
Second Successor Personal Representative		

trust may be established under yo	entity who administers and distributes property held in a trust. A our will for a variety of purposes such as for tax purposes or for the cy that would otherwise pass outright to minor children. Please list
their names and City/State.	y that would otherwise pass outright to himor emitten. I lease list
,	Name, Address, Phone Number
Trustee	
Successor Trustee	
Second Successor Trustee	
support, care, education, health, a	pproved individual who makes decisions regarding a minor child's and welfare. Please list their names and City/State.
Guardian Name:	
Address:	
Successor Guardian Name:	
Address:	
authorized to make financial deci authorize your agent to assist you	sions for you during your life. The power of attorney is a person in making those decisions for yourself while you have capacity or n the event that you are incapacitated.
	Name:
	Address:
Agent	Phone:
	Marital Status:
	Spouse:
	Name:
	Address:
Successor Agent	Phone:
	Marital Status:
	Spouse:

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. Name: Address: Agent Home Phone: Mobile Phone: Marital Status: Spouse: Name: Address: Successor Agent Home Phone: Mobile Phone: Marital Status: Spouse: Name: Address: 2nd Successor Agent Home Phone: Mobile Phone: Marital Status: Spouse: 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

1 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			

	Value	JOINT with anyone or NAMED Beneficiary?	Name of Financial Institution
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)			

REAL ESTATE	OWNED BY	ADDRESS	VALUE
Primary Residence			
Secondary Residence			

BUSINESSES / STATE	OWNED BY	BUSINESS NAME	VALUE
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: