



## Estate Planning Questionnaire

How did you hear about us?	
<b>I. GENERAL INFORMATION</b>	
	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?	
<small>* 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.</small>	





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, Address, Phone Number
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, Address, Phone Number
Trustee	
Successor Trustee	
Second 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:

Successor Guardian Name:

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.

Agent	Name: Address: Phone: Marital Status: Spouse:
Successor Agent	Name: Address: 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.

Agent	Name:  Address:  Home Phone: Mobile Phone: Marital Status: Spouse:
Successor Agent	Name:  Address:  Home Phone: Mobile Phone: Marital Status: Spouse:
2 <sup>nd</sup> Successor Agent	Name:  Address:  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.

	Value	JOINT with anyone or NAMED Beneficiary?	Name of Financial Institution
Cash			
Checking Accounts			
Savings Accounts			
CD's			



<b>BUSINESSES / STATE</b>	<b>OWNED BY</b>	<b>BUSINESS NAME</b>	<b>VALUE</b>
<b>TOTAL ASSETS</b>			

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

Questions for the Attorney:

