

E-mail Client Questionnaire

Your Full Legal Name & birth date: _____

Spouse/Partner & birth date: _____

Permanent Address: _____

County: _____ Email: _____

Citizenship: _____ Marital Status: _____

Number & full name & birth date of children:

Are any more anticipated? _____

Stepchildren? _____

Grandchildren? _____

Have you ever signed a community property agreement? _____

Approximate Value of Assets by Major Category:

1. Real estate: (list fair market value and any mortgages) _____

2. Retirement Accounts (IRA, 401k, etc) and who are primary/contingent beneficiaries:

3. Cash/checking/savings/CDS/savings bonds: _____

4. Stocks/Bonds, Brokerage Accts, Mutual Funds (not retirement) and how account is titled (e.g. whether joint tenancy with right of survivorship, tenants in common, or payable on death):

5. Life Insurance: (type, amount payable at death, beneficiaries): _____

6. Notes or Annuities payable to you: _____

7. Personal Property (estimate of garage sale value of Furniture, furnishings, jewelry, cars, collectibles, art, etc): _____

8. Other assets? _____

9. Potential Inheritance? _____

10. Any liabilities/debts other than mortgages listed above? _____

Have you ever made any gifts larger than \$13,000 per person per year? If so, list:

Would you like to have the ability to make a list of personal property and who gets it upon your death? (If yes, your Will can refer to a separate list which you can prepare at any time. If no, it will all go to whomever you name in the Will):

Other than what is on a personal property list, who do you want your property to go to when you die (include middle name or initial if possible and relationship of person to you)?

If any of those people die before you, to whom should their share go?

If any of these people are minors, at what age should they have control of their share?

Who should hold the property for minors in a trust until they turn that age?

For minor children, whom do you want to name as guardian?

As alternate guardian?

As Trustee of children's trust?

At what age(s) should children receive trust funds outright?

Who should serve as Personal Representative (Executor?) of your estate?

As alternate Personal Representative?

Who should serve as Power of Attorney?

Alternate Power of Attorney?

The addresses of persons to serve under Power of Attorney:

Do you want a health care directive (living will) to refuse artificial life support if it's hopeless?

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