

ESTATE PLANNING QUESTIONNAIRE

- Executor** (deals with your property after your death, pays your bills and taxes, and distributes your property in the manner your direct in your will)

- Trustee** (if a trust is established, the trustee receives property from the executor, manages and invests it for the beneficiary, and makes distributions to the beneficiary in the manner you direct in your will)

- Guardian** (has physical custody of and responsibility for children until age 18)

1. CLIENT 1'S WILL - Agents:

Executor	_____
Alternate Executor(s)	_____
Trustee	_____
Alternate Trustee(s)	_____
Guardian	_____
Alternate Guardian	_____

2. CLIENT 2'S WILL - Agents:

Executor	_____
Alternate Executor(s)	_____
Trustee	_____
Alternate Trustee(s)	_____
Guardian	_____
Alternate Guardian	_____

3. STATUTORY DURABLE POWER OF ATTORNEY is a document in which you may each appoint an agent (often initially the spouse) to act for you in most matters in which you can act by signing your name. It is particularly valuable in the event you become incapacitated.

Client 1's Agent for Power of Attorney (include address) _____

Alternate Agent(s) & Address(es) _____

Client 2's Agent for Power of Attorney (include address) _____

Alternate Agent(s) & Address(es) _____

4. **MEDICAL POWER OF ATTORNEY** is a document in which you may each appoint an agent (often initially the spouse) to act for you in the event you need medical treatment but are unable to communicate your wishes to the doctor.

Client 1's Agent for Health Care Power of Attorney
(include address and phone)

Client 1's Alternate Agent(s) (include address and phone)

Client 2's Agent for Health Care Power of Attorney
(include address and phone)

Client 2's Alternate Agent(s) (include address and phone)

5. **DIRECTIVE TO PHYSICIANS AND SURROGATES** ("Living Will") is a document in which you state that in the event you cannot say what you want at the time and can no longer take care of yourself, if you have (A) a terminal condition with which you are not expected to live more than 6 months even with all available life support, or (B) an irreversible condition with which you cannot continue to live unless you have life support, whether or not you would prefer to have the life support applied, or withdrawn and be allowed to die naturally.

Would you like this document? **Client 1** Yes No **Client 2** Yes No

6. **DESIGNATION OF GUARDIAN** is a document in which you indicate the person you want to handle your property or be responsible for your person if a court determines you are incapacitated and a guardianship is necessary.

Client 1's Preferred Guardian of Property _____
Alternate(s) _____

Client 1's Preferred Guardian of Person _____
Alternate(s) _____

Client 2's Preferred Guardian of Property _____
Alternate(s) _____

Client 2's Preferred Guardian of Person _____
Alternate(s) _____

7. **ORGAN DONATION.** Would you like to receive information on being an organ donor?.

Client 1 Yes No **Client 2** Yes No

PASSAGE OF PROPERTY:

Client 1's Will

If your spouse survives you:

Do you want to make specific gifts of specific property? If so, describe:

<u>property</u>	<u>passes to whom</u>
_____	_____
_____	_____

Regarding the balance of your property, would you like it to pass

_____ all to spouse (or trusts for spouse's benefit)
_____ in another manner (please describe) _____

If your spouse predeceases you:

Do you want to make specific gifts of specific property? If so, describe:

<u>property</u>	<u>passes to whom</u>
_____	_____
_____	_____

Regarding the balance of your property, would you like it to pass

_____ to children and descendants:
_____ outright
_____ in trust until age _____

circumstances under which income and/or
principal are to be distributed: _____

_____ in another manner (please describe) _____

In the very unlikely event that at your death, your spouse, children and other descendants have all predeceased you, you would want your property to pass:

_____ to charity
_____ to friends/relatives (names) _____
_____ by statute to heirs at law

Client 2's Will

If your spouse survives you:

Do you want to make specific gifts of specific property? If so, describe:

<u>property</u>	<u>passes to whom</u>
_____	_____
_____	_____

Regarding the balance of your property, would you like it to pass

___ all to your spouse (or trusts for spouse's benefit)
___ in another manner (please describe) _____

If your spouse predeceases you:

Do you want to make specific gifts of specific property? If so, describe:

<u>property</u>	<u>passes to whom</u>
_____	_____
_____	_____

Regarding the balance of your property, would you like it to pass

___ to children and descendants:
___ outright
___ in trust until age ___

circumstances under which income and/or
principal are to be distributed: _____

___ in another manner (please describe) _____

In the very unlikely event that at your death, your spouse, children and other descendants have all predeceased you, you would want your property to pass:

___ to charity
___ to friends/relatives (names) _____
___ by statute to heirs at law