



ESTATE PLANNING QUESTIONNAIRE

Today's Date: _____

Referred by: _____

Your Name: _____

Address: _____

Phone: _____ Age: _____

Occupation: _____ Resided in Florida since: _____

Have you ever made a will or a trust? Yes No

Safe deposit box is at: _____

Citizen of U.S.? Yes No If No, where? _____

Accountant: _____

Life Insurance Agent: _____

Stock Broker: _____

Investment Representative: _____

FAMILY INFORMATION

	NAME	ADDRESS	PHONE	AGE
Spouse				
Children				
Spouse's Children				

At your death, who do you want to take care of:

(a) Administering your estate (personal representative):

1ST Choice: _____

2nd Choice: _____

(b) Your minor children's financial affairs (guardian of property):

1ST Choice: _____

2nd Choice: _____

(c) Your minor children's medical/personal decisions (guardian of person):

1ST Choice: _____

2nd Choice: _____

ASSET INFORMATION (Estimated values)

YOUR NAME ALONE
JOINT WITH SPOUSE

SPOUSE'S NAME
ALONE

Life Insurance

Home

Other Real Estate

Stocks, Bonds, Etc.

Bank, Savings, CD's, Money
Markets, Etc.

IRA's, Pensions, Etc.



YOUR NAME ALONE
JOINT WITH SPOUSE

SPOUSE'S NAME
ALONE

Furnishings, Jewelry, Autos,
& Tangible Property

Inheritances Expected

Other Assets

Totals

WILL AND TRUST DISPOSITIVE INFORMATION

Please list the persons to whom you want to leave your assets at your death. Also, list alternates to receive each gift in case the person you name dies before you.

(a) Special gifts of jewelry, furnishings, autos, collections, and other tangible property:

(b) Gift of all remaining tangible property:

(c) Special gifts of cash, stock or other specific items:

(d) Gift of all remaining assets (residue):

(e) Would you like to be an organ donor?



(f) Any specific requests with regard to the disposition of your remains? (e.g. burial at designated cemetery or cremation)

TRUSTS FOR MINORS OR OTHERS

List persons (such as minor children) for whom you want assets held in trust instead of being distributed to them at your death, so that the trustee invests and distributes the assets on a certain schedule until the beneficiaries can do so alone:

Who do you want to be the trustee (may be bank or individual)?

Please provide alternates for the role of trustee:

List the age at which you want the beneficiary or beneficiaries to begin directly receiving income from the trust (e.g, age 21):

List the age(s) at which you want the beneficiary or beneficiaries to receive the principal (e.g., in thirds at ages 25, 30 and 35):

OTHER ESTATE PLANNING DOCUMENTS

In addition to your last will and testament...

Who would you designate as your durable power of attorney to handle your financial affairs and bill paying in the event you are out of town or out of the country?

1ST Choice: _____

2nd Choice: _____

Do you want to sign a living will to express your desires concerning the non-use of medical procedures to prolong your life in case of terminal illness? Yes No

Who would you designate as your health care surrogate to give them the power to make medical decisions for you if you are unable to do so?

1ST Choice: _____

2nd Choice: _____