

ESTATE PLANNING QUESTIONNAIRE

Please help us prepare your will by providing us the following information to the best of your ability. **We will keep this information strictly confidential.**

Name _____ Social Sec. No. _____

Address _____ Home Phone _____
_____ Work Phone _____

Have you ever lived in state other than Texas? If yes, please give us details (where, when, how long?): _____
_____.

Marital History

Are you currently married? Yes _____ No _____. If yes, complete the following:

Spouse's name _____ Date of marriage _____

Are you widowed? Yes _____ No _____. If yes, complete the following:

Spouse's name _____ Date of death _____

Residence at date of death _____

Did your spouse have a will? Yes _____ No _____. If yes, please give us a copy.

Are you divorced? Yes _____ No _____. If yes, please complete the following:

Ex-spouse's name _____ Date of divorce _____

Place of divorce _____

Children

Please list all of your children (by birth or adoption):

<u>Name</u>	<u>Birthdate</u>	<u>Address</u>	<u>Alive? (Y/N)</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Is there anyone other than your spouse and children who you support financially (for example, a grandchild or parent)? If yes, please give us details: _____

_____.

Assets

Real Property

Residence _____ Date acquired _____
_____ Amount owed _____

Any other? _____ Date acquired _____
_____ Amount owed _____

Cash/Bank Accounts

What amount of cash do you usually keep? \$ _____

Please list all of your bank accounts:

<u>Name of Bank</u>	<u>Balance</u>	<u>Name on Account</u>
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Do you own an interest in any business? If yes, please give us details: _____

_____.

Please list any insurance on your life or your spouse's life:

<u>Company</u>	<u>Policy No.</u>	<u>Insured</u>	<u>Face Amount</u>	<u>Date Acquired</u>
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Please list any retirement plans (for example, IRAs, ESOPs, 401(k) plans):

<u>Company/Institution</u>	<u>Name on Account</u>	<u>Amount</u>	<u>Beneficiary</u>
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Please list any cars, boats, trailers, etc.:

<u>Make</u>	<u>Model</u>	<u>Date Acquired</u>	<u>Owner</u>	<u>Amount Owed</u>

Describe any furniture, household goods, personal effects, or other items of particular sentimental or economic value: _____

_____.

Will Provisions

Who are the beneficiaries of your estate? Please also think about who you would like to receive your property if the persons you would normally leave it to are not alive at the time of your death.

You can give away your tangible personal property (for example, vehicles, furniture, household goods, personal effects) by attaching a note to your will, **entirely in your own handwriting, signed and dated by you**. You can change this note whenever you wish. If you would rather place these instructions in the will we prepare, let us know which items you would like to give to which beneficiaries. It is not necessary to list specific items if all of this type of property is given to a single person or class of persons (for example, "all to my spouse" or "all to my children who survive me, in equal shares"). _____

_____.

What about the rest of your assets? For example, do you want everything else you own to go to your spouse, if he or she is alive? Yes _____ No _____. If your spouse is not alive (or you are not married), do you want everything else to go to your children (or their children, if they are not alive)? Yes _____ No _____. What if you have no spouse, children, grandchildren, etc. at the time of your death? _____

_____.

Who do you want to name as "executor" of your estate? (This is the person who will administer your estate by paying your debts and distributing your property to your beneficiaries.) Two people can act together at the same time.

<u>Name</u>	<u>Address</u>	<u>Relationship</u>
First _____	_____	_____
Second _____	_____	_____
Third _____	_____	_____

Who do you want to name as "guardian" of your minor children? (This is the person who will take care of them and raise them.) Two people can act together at the same time only if they are married to each other.

<u>Name</u>	<u>Address</u>	<u>Relationship</u>
First _____	_____	_____
Second _____	_____	_____
Third _____	_____	_____

Durable Power of Attorney

Do you want to name someone as your "agent" or "attorney-in-fact?" This is a person who has authority to pay your bills, sell your assets, etc., if you ever become incompetent to do this yourself. Naming an agent can save a great deal in court costs and legal fees, but you should only name someone you trust completely. Two people can act together at the same time.

<u>Name</u>	<u>Address</u>	<u>Relationship</u>
First _____	_____	_____
Second _____	_____	_____
Third _____	_____	_____

Power of Attorney for Health Care

Do you want to name someone as your agent for the purpose of making medical or other health care decisions for you, if you ever become incompetent to make these decisions yourself? Again, naming an agent can save a great deal, but you should name someone you trust.

<u>Name</u>	<u>Address</u>	<u>Relationship</u>
First _____	_____	_____
Second _____	_____	_____
Third _____	_____	_____

Directive to Physician or "Living Will"

Do you want your life prolonged, if it can only be sustained by artificial means? If not, you can sign a directive to physician, commonly known as a "living will," to express these desires. You can also name someone as your agent for the purpose of making this final decision for you when the time comes.

<u>Name</u>	<u>Address</u>	<u>Relationship</u>
First _____	_____	_____
Second _____	_____	_____
Third _____	_____	_____

Do you sign your name or use a mark? Sign name _____ Use mark _____.

Please note that funeral or burial instructions should not be in your will. You should let your family members know if you have any special wishes. Also inform them if you want to donate any of your organs. You can obtain a form to do this where you get your driver's license.

Please let us know if there is anything else we can do to help you!