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ESTATE PLANNING QUESTIONNAIRE

Please complete this First page for each person who would like an estate planning document. If the information on remaining pages is different, please complete all for each person.

Your Name _____

Name as it appears on your Driver's License or ID _____

Street Address _____

City _____ State _____ Zip _____

Place of Birth _____ Date of Birth _____

Social Security No. (Last 4 #s ONLY for security) XXX-XX-____

Home Phone No. _____ Cell No. _____

E-Mail Address _____

Which the best way to communicate with you? ___Phone ___Email ___Text

How did you hear about this office? ___Internet ___Seminar ___Person,

Name _____ (please share so we can thank them)

Spouse/Partner Name _____

Married? Yes No Date of Marriage _____

Your Children's Names	Year of Birth	Natural?	Living?

Have you been married before? Yes No How did it end? _____

Have you ever made an estate plan? Yes No

Do you own any real estate by yourself or jointly with someone else? Yes No

Real estate in Florida Value \$ _____ Who owns? _____

Real estate in other states, State: _____ Value \$ _____

Do you have any bank accounts? Yes No (Savings, checking, money market, safe deposit box, certificates of deposit)

If yes, indicate value and location _____

Interests in businesses you have _____

Insurance policies (indicate company, face value and named beneficiary) _____

Other financial information _____

Do you have retirement accounts? Yes No (Traditional IRAs, Roth IRAs, 401ks, other)

If yes, indicate value and location _____

Total net value of your entire estate: \$ _____

Primary Beneficiary(ies) of your estate:

Alternate Beneficiary(ies):

Do you plan to leave gifts to charities? Yes No

Which charities or charity purposes?

Do you want to give any Specific gifts to people?

Are any of your beneficiaries disabled? Yes No

If yes, who? _____

Is there a specific person you wish to **disinherit or purposely leave out**?

Who do you want as Personal Representative (Executor)?

Name: _____ Relationship _____

Alternate: _____ Relationship _____

For people with minor beneficiaries only:

Trustee for Minors (to manage their money)

Name: _____ Relationship _____

Alternate: _____ Relationship _____

If they are your children, who would be the Guardian to raise them?

Name: _____ Relationship _____

Alternate: _____ Relationship _____

Have you made funeral/burial/cremation arrangements with anyone? Yes No

If yes, what type of arrangements? _____

What organization are your arrangements with and where? _____

Do you have any specific desires about your final arrangements? Yes No (Such as a military funeral, no funeral, certain religious ceremony) _____

Who would you name as your agent on your Durable Power of Attorney?

Name: _____ Relationship _____

Alternate: _____ Relationship _____

Do you wish to have a Living Will? Yes No

Do you wish to name a Health Care Surrogate? Yes No

Who would you designate as your Health Care Surrogate?

Name: _____ Relationship _____

Alternate: _____ Relationship _____

Additional Questions: _____

Estate Planning Documents Information

If you can, please provide the information below for each person you want named in your Estate Planning documents, whether as representative or as beneficiary. Please feel free to copy this page if you need to name additional people.

Name: _____ Relationship: _____

Street Address: _____

City, State, Zip: _____

Primary phone (_____) _____ Alternate phone (_____) _____

Name: _____ Relationship: _____

Street Address: _____

City, State, Zip: _____

Primary phone (_____) _____ Alternate phone (_____) _____

Name: _____ Relationship: _____

Street Address: _____

City, State, Zip: _____

Primary phone (_____) _____ Alternate phone (_____) _____

Name: _____ Relationship: _____

Street Address: _____

City, State, Zip: _____

Primary phone (_____) _____ Alternate phone (_____) _____

Name: _____ Relationship: _____

Street Address: _____

City, State, Zip: _____

Primary phone (_____) _____ Alternate phone (_____) _____

Definitions to Help You

Beneficiaries are the people who will receive your assets. You may direct that your entire estate will go to one or more people or organizations. Additionally, you may make specific gifts of sums of money or certain assets to a specific person, or persons, or organizations. If you make specific gifts, you also must designate who will receive the rest of your assets.

Primary Beneficiary(ies): Those who you wish to leave the bulk of your assets (after specific gifts are made) so long as they survive you.

Alternate Beneficiary(ies): If your primary beneficiaries do not survive you then these are the recipients you choose.

Durable Power of Attorney gives someone the right to act on your behalf for many or all of your financial matters. They can act “in your shoes” beginning the day you execute the document. A power of attorney is a strong document and should name only those who are fully trustworthy.

Guardian. Person to be appointed by the Court to be guardian of the person of your minor children or grandchildren. The courts first look to who you designate in your will.

Personal Representative or Executor. This is the person who will carry out the terms of your will once you pass away. They must be mentally competent, over 18 years of age and cannot be convicted of a felony. If they are your surviving spouse, or a blood relative, or the spouse of a blood relative they do not have to be a resident of Florida to serve as a personal representative; if they are not, they must be a resident of Florida or a Florida bank with trust powers.

Probate is the court process of making sure all assets in your name alone are properly distributed (according to your will or Florida law) after dealing with creditors and taxes. It is not private and can be costly but it is possible to avoid probate with trusts and other tools.

Living Will tells others that you do not want to be kept alive by artificial means if you have an *end stage condition*, are *terminally ill*, or are in a *chronic vegetative state*.

Specific Gift is a specific asset that you leave to one or more persons. For instance, a specific sum of money, a vehicle, a certain stock, or other large personal property gifts.

Separate Writing is a list you may prepare at any time that designates certain personal property items for individuals. An example would be, “my mother’s wedding ring.” We provide a blank separate writing for you to complete after executing your estate documents.

Special Needs Trust is a trust created for a disabled individual to help them without causing them to lose public benefits. This trust can be a part of a Will or Trust, or a separate trust.

Testamentary Trust. Especially if you have minor children or people who cannot manage money, a trustee could control that person’s share until they reach a certain age, without the need for court involvement.

Trust is a legal document that allows you to hold assets in the name of a trust. With proper planning a well drafted trust can help reduce estate challenges, taxes and estate expenses.

Will is a document that directs where your assets are to go on your death.