TRUE, WALSH & MILLER, LLP

ESTATE PLANNING QUESTIONNAIRE

Please provide the following information. We don't need exact numbers for financial information, but we do need to know who owns an asset, and for retirement and life insurance, who has been named as beneficiary. Feel free to call us if you have questions about this form.

Name:	Social Security No.:	Phone (H)
Address:	US Citizen? ◉ Yes No ○ If not, citizenship:	Phone (W)
Email address:		
Spouse's Name:	Social Security No.:	Phone (H)
Spouse's email:	US Citizen? ◉ Yes No ○ If not, citizenship:	Phone (W)
Your occupation:	Your date of birth:	Your military service:
Spouse's occupation:	Spouse's date of birth	Spouse's military service:
Have you ever been divorced? ○ Yes No ◉	If yes, list court/date of prior divorce	
Has your spouse ever been divorced? ○ Yes No ◉	If yes, list court/date of prior divorce	

List children's names:	Child's Birth Date or Age	Sex	Married?	Child's address, if not same as yours	
1					
2					
3					
4					
List grandchildren's names:	Grandchild's Birth Date or Age	Sex	Married?	Which child is parent of each grandchild?	Grandchild's Address, if not with parent
1					
2					
3					

<u>PLANNED DISTRIBUTION</u>

Is your basic goal to provide as much as possible to the surviving spouse while minimizing estate taxes, and on the death of the survivor, to leave everything to your children? (You can note specific bequests below)

__________ ◉ YES __________ ○ NO

If not, please state generally what you would like:

____

____

____

____

TANGIBLE PROPERTY: (any special items to dispose of, jewelry, antiques, heirlooms, etc.)

SPECIFIC BEQUESTS: (specific amounts to specific people or charities)

WHO SHOULD GET THE "RESIDUE & REMAINDER" (if not to spouse and/or children):

SHOULD BEQUESTS TO CHILDREN, GRANDCHILDREN OR OTHERS BE PUT IN TRUST? If so, please think about what trust terms might be appropriate, such as the standards for making distributions (such as "health, education and welfare"), and the age(s) for distributing trust principal (such as 30% at age 25, and the balance at age 30). We can design trusts to accomplish your specific objectives. If you have thoughts about trust terms, please note them below. Otherwise, we can discuss this issue when we meet.

FIDUCIARIES:

Executor:	Address (include e-mail):	Relationship:
Co-executor, if any:	Address:	
Successor Executor:	Address:	
Trustee:	Address:	
Successor Trustee:	Address:	
Guardian(s) for minor children:	Address:	
Successor Guardian:	Address:	

FINANCIAL SUMMARY

Probate Assets	Husband	Wife	Joint
Real property (net of mortgage)			
Vacation property (What state)			
Income Real Property			
Tangible personal property (jewelry, antiques, cars (net of car loans), boats, etc.)			
Bank accounts			
Brokerage accounts (not retirement accounts)			
Other financial assets			
Total probate assets:	$0	$0	$0
Non-probate Assets:			
Retirement accounts - Employer sponsored			List beneficiary of retirement accounts and life insurance:
IRA's - regular			
IRA's - Roth			
Pre-tax annuities			
Life Insurance - employer sponsored			
Other TERM life insurance			
Other WHOLE life insurance (i.e., insurance with cash value; note amount of cash value and amount of death benefit)			
Total NON-PROBATE assets:	$0	$0	
Total TAXABLE assets (probate and non-probate)	$0	$0	$0

OTHER INFORMATION

1. Have you given anyone power of attorney? ____________
If so, please provide a copy.

If not, do you wish to do so? ____________
If so, to whom?
____

2. Do you want to name a Health Care Proxy (to make medical decisions in the event of incapacity)? ____________

If so, to whom would you like to give your proxy?
____

3. If you have any other concerns or desires that we should know about, please explain below:

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