



Estate & Insurance Questionnaire

Client Name(s) _____ Date: _____

Section A – Estate Planning

1. Which of the following estate documents do you wish to discuss? (√)

<u>Document</u>	<u>Discuss</u>	<u>Have</u>	<u>Year Written</u>	<u>Do Not Have</u>
Last Will and Testament				
Durable Power of Attorney				
Living Will (Directive to Physicians)				
Health Care Power of Attorney				
Trusts				
Community Property Agreement				

2. If you do not have an up-to-date Will, you will need to consider who you would like to appoint for the following areas (primary and successor should be identified).

	<u>Name</u>	<u>Address</u>	<u>Phone</u>
Personal Representative (to carry out terms of will)			
Guardian (for minor children)			
Trustee / Co-Trustee (to manage any trusts or trusts established by will)			

3. For minor or special needs children there are some areas that need to be decided.

3a. Who will be guardian of the children's assets? _____

3b. Are there any special situations that would require an unequal distribution of assets between children? _____

3c. Do you want the children to begin receiving their inheritance at a certain age? _____ yrs.

3d. Do you want your children to receive their inheritance over a period of years? Yes No



4. Are there previous marriages that will need to be taken into consideration? Yes No
- 4a. If so, are there children from those marriages? Yes No
5. Pre-nuptial, post-nuptial or marital settlement agreements will need to be considered. Have any of these been signed by either party? Yes No
6. Do you want to include charitable gifting in your estate plans? Yes No
7. In the past have you ever filed a Federal Gift Tax Return? Yes No
8. Funeral and burial wishes should be detailed in advance with a copy going to those most likely to need it. This information should be separate from the Will which may not be immediately available.

Section B – Insurance Planning

1. Indicate the insurance areas in which you feel you may be under or over insured.
 Life Disability Long Term Care
 If not previously supplied, we will need copies of all policies for this insurance
2. We recommend that you have an umbrella liability policy with a coverage amount of at least two times your net worth. Do you currently have this coverage? Yes No
3. Are there any specific debt that you would like your life insurance coverage to pay off for your heirs?
 Yes No Debt(s) to pay off: _____