



Bean | Gentry | Wheeler | Peternell  
P.L.L.C.

**CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE**

**PERSONAL INFORMATION**

**HUSBAND**

**WIFE**

\_\_\_\_\_  
*Name (list as you want on your documents)*

\_\_\_\_\_  
*Name (list as you want on your documents)*

\_\_\_\_\_  
*Street*

\_\_\_\_\_  
*Street*

\_\_\_\_\_  
*City, State ZIP*

\_\_\_\_\_  
*City, State ZIP*

\_\_\_\_\_  
*Home Telephone*

\_\_\_\_\_  
*Home Telephone*

\_\_\_\_\_  
*Business Telephone*

\_\_\_\_\_  
*Cell Telephone*

\_\_\_\_\_  
*Business Telephone*

\_\_\_\_\_  
*Cell Telephone*

\_\_\_\_\_  
*Email Address*

\_\_\_\_\_  
*Email Address*

\_\_\_\_\_  
*Date of Birth*

\_\_\_\_\_  
*Social Security Number*

\_\_\_\_\_  
*Date of Birth*

\_\_\_\_\_  
*Social Security Number*

\_\_\_\_\_  
*Years lived in State of Residence*

\_\_\_\_\_  
*Years lived in State of Residence*

\_\_\_\_\_  
*Date of Marriage*

\_\_\_\_\_  
*Referral Source*

**OTHER INFORMATION**

	Yes	No
<b>Husband:</b> Are you a U.S. Citizen? If no, what country?		
<b>Wife:</b> Are you a U.S. Citizen? If no, what country?		
Did either of you own a substantial amount of property prior to this marriage?		
Have either of you made any gift to an individual exceeding \$13,000 in one calendar year?		
Have you received an inheritance? If yes, please indicate the amount and year:		
Are either of you the beneficiary of a trust?		
Do either of you expect to receive any gifts or inheritances in the future?		
Have either of you had former marriages? If yes, date of marriage: _____ Date of dissolution or death of former spouse: _____		
Do either of you have financial obligations to a former spouse?		
Do either of you have financial obligations for child support?		
Do you own any real estate outside your state of residence? <i>If so, indicate state and county and include the property address on the attached net worth statement.</i>		
Do you own a business which has made an "S" election for income tax purposes?		
Do you have any dependents with special needs?		
Have any of your children received (or are likely to receive) any government assistance, such as SSI? If so, who:		
Has anyone in your family been adopted? <i>Please attach an explanation</i>		
Do you have any deceased children?		
<b><i>Do you have any of the following estate planning documents?*</i></b>		
Revocable Living Trust		
Other Trust		
Prenuptial Agreement		
Will		
Community Property Agreement		
Power of Attorney – Financial		
Power of Attorney – Health Care		
Do either of you own a long-term care insurance policy?		
<b>Husband:</b> Have you ever served in the military? If, so rank: _____, Identification No.:		
<b>Wife:</b> Have you ever served in the military? If, so rank: _____, Identification No.:		

*\*If yes, please provide copies of relevant documents*

**ADVISOR INFORMATION**

Accountant/Tax Preparer:

\_\_\_\_\_  
*Name Telephone*

\_\_\_\_\_  
*Address*

Investment Counselor:

\_\_\_\_\_  
*Name Telephone*

\_\_\_\_\_  
*Address*

## CHILDREN

	First Child	Second Child
<b>Name</b>		
<b>Date of Birth</b>		
<b>Address</b>		
<b>Name of Child's Spouse</b>		
<b>Name of Grandchildren and Ages</b>		
<b>Parent (if from prior marriage)</b>		
<b>Is this child adopted?</b>		
	Third Child	Fourth Child
<b>Name</b>		
<b>Date of Birth</b>		
<b>Address</b>		
<b>Name of Child's Spouse</b>		
<b>Name of Grandchildren and Ages</b>		
<b>Parent (if from prior marriage)</b>		
<b>Is this child adopted?</b>		

	Fifth Child	Sixth Child
<b>Name</b>		
<b>Date of Birth</b>		
<b>Address</b>		
<b>Name of Child's Spouse</b>		
<b>Name of Grandchildren and Ages</b>		
<b>Parent (if from prior marriage)</b>		
<b>Is this child adopted?</b>		

## RETIREMENT PLAN INFORMATION

<b>Husband</b>	<b>Wife</b>
Please indicate the current account balance or monthly retirement benefit (not including SSI benefits): \$ _____	Please indicate the current account balance or monthly retirement benefit (not including SSI benefits): \$ _____
Please describe the retirement benefit plan which your employer maintains for its employees:  <b>Plan 1:</b>  <b>Plan 2:</b>	Please describe the retirement benefit plan which your employer maintains for its employees:  <b>Plan 1:</b>  <b>Plan 2:</b>
Please indicate the beneficiaries of the retirement plan:  Plan 1 Beneficiary: _____  Plan 2 Beneficiary: _____	Please indicate the beneficiaries of the retirement plan:  Plan 1 Beneficiary: _____  Plan 2 Beneficiary: _____

## LIFE INSURANCE INFORMATION

	<b>Husband – Policy No. 1</b>	<b>Wife – Policy No. 1</b>
<b>Company</b>		
<b>Face Amount</b>		
<b>Type</b> (variable, whole life, term)		
<b>Loans on Policy</b>		
<b>Owner of Policy</b>		
<b>Beneficiary(ies)</b>		

	<b>Husband – Policy No. 2</b>	<b>Wife – Policy No. 2</b>
<b>Company</b>		
<b>Face Amount</b>		
<b>Type</b> (variable, whole life, term)		
<b>Loans on Policy</b>		
<b>Owner of Policy</b>		
<b>Beneficiary(ies)</b>		

## FIDUCIARY CHOICES

### Executor/Personal Representative

*Your personal representative is responsible for settling the financial affairs of your estate, including investment of your assets, paying any final bills and distributing your assets in accordance with your Last Will.*

	Husband	Wife
<b>Name of First Choice</b>		
Address		
Phone Number		
<b>Name of Alternate</b>		
Address		
Phone Number		
<b>Name of Second Alternate</b>		
Address		
Phone Number		

### Trustee

*Your Trustee manages your assets for the benefit of your beneficiaries after your death. Trusts are often used to protect beneficiaries, such as young children, from making ill-advised investments and spending decisions or to protect assets from the beneficiary's creditors (including situations involving divorce). Trusts can last for many years. Please consider this when selecting your trustee.*

	Husband	Wife
<b>Name of First Choice</b>		
Address		
Phone Number		
<b>Name of Alternate</b>		
Address		
Phone Number		
<b>Name of Second Alternate</b>		
Address		
Phone Number		
Comments:		

**Guardian for Children**

*After your death, your guardian will be responsible for the care and upbringing of your children (or other dependents in your care) so long as they are minors or otherwise incapacitated.*

	<b>Husband</b>	<b>Wife</b>
<b>Name of First Choice</b>		
Address		
Phone Number		
<b>Name of Alternate</b>		
Address		
Phone Number		
<b>Name of Second Alternate</b>		
Address		
Phone Number		
Comments:		

**Durable Power of Attorney**

*A Durable Power of Attorney is a document appointing another person (called the attorney-in-fact) to make financial and health care decisions for you if you become incapacitated or disabled.*

- A. Attorney-in-Fact (Financial). Powers include the purchase and sale of property; access to financial records and accounts; investment of assets; continuation of business interests; and tax and estate planning.

	<b>Husband</b>	<b>Wife</b>
<b>Name of First Choice</b>		
Address		
Phone Number		
<b>Name of Alternate</b>		
Address		
Phone Number		
<b>Name of Second Alternate</b>		
Address		
Phone Number		
Comments:		

- B. Attorney-in-Fact (Health Care). Powers include giving directions to health care providers regarding medical treatments and life sustaining procedures; access to medical records; and addressing your long-term care needs.

	<b>Husband</b>	<b>Wife</b>
<b>Name of First Choice</b>		
Address		
Phone Number		
<b>Name of Alternate</b>		
Address		
Phone Number		
<b>Name of Second Alternate</b>		
Address		
Phone Number		
Comments:		

**PROPERTY DISTRIBUTION**

Briefly state how you prefer to have your property distributed upon your death:


**Contingent Beneficiary**

*In the event all immediate family does not survive you, provide names, addresses and phone numbers for contingent beneficiaries of your choice.*


## NET WORTH STATEMENT

### ASSETS

Real Estate

Home \$ \_\_\_\_\_

Vacation Home \$ \_\_\_\_\_

Business \$ \_\_\_\_\_

Other: \$ \_\_\_\_\_

Personal Property

Home Furnishings \$ \_\_\_\_\_

Autos/Vehicles \$ \_\_\_\_\_

Jewelry, etc. \$ \_\_\_\_\_

Other: \$ \_\_\_\_\_

Life Insurance

Husband Total

Death Benefit \$ \_\_\_\_\_

Wife Total

Death Benefit \$ \_\_\_\_\_

Cash in Bank

Checking Account \$ \_\_\_\_\_

Savings Account \$ \_\_\_\_\_

Other Accounts \$ \_\_\_\_\_

Retirement Plans

Husband – IRA \$ \_\_\_\_\_

Husband – 401 (k) \$ \_\_\_\_\_

Wife – IRA \$ \_\_\_\_\_

Wife – 401 (k) \$ \_\_\_\_\_

Other Investments

Stock \$ \_\_\_\_\_

Bonds \$ \_\_\_\_\_

Mutual Funds \$ \_\_\_\_\_

Annuities \$ \_\_\_\_\_

Other: \$ \_\_\_\_\_

Trust Assets \$ \_\_\_\_\_

Miscellaneous \$ \_\_\_\_\_

**TOTAL ASSETS** \$ \_\_\_\_\_

### LIABILITIES

Mortgages/Contracts Owing

Home \$ \_\_\_\_\_

Vacation Home \$ \_\_\_\_\_

Business \$ \_\_\_\_\_

Other: \$ \_\_\_\_\_

Loans

Autos/Vehicles \$ \_\_\_\_\_

Personal \$ \_\_\_\_\_

Life Insurance \$ \_\_\_\_\_

Other: \$ \_\_\_\_\_

**TOTAL LIABILITIES** \$ \_\_\_\_\_

**TOTAL ASSETS** \$ \_\_\_\_\_

*Less total liabilities* \$ \_\_\_\_\_

**NET WORTH** \$ \_\_\_\_\_