ESTATE PLANNING "QUICK" QUESTIONNAIRE

Do you have old documents	? YOR N	? If yes, copies or originals?
If yes, what documents?		
Date:		
NAME:		
ADDRESS:		
		(County)
PHONE:		
CELL PHONE:		
BIRTH DATE:		
SPOUSE:		
ADDRESS:		
PHONE:		
CELL PHONE:		
EMAIL:		
BIRTH DATE:		U.S. CITIZEN?
CHILDREN:(NUMBER OF)	
NAME:		
DATE OF BIRTH:		
If adult, ADDRESS:		
If adult, PHONE:		

NAME:
DATE OF BIRTH:
If adult, ADDRESS:
If adult, PHONE:
NAME:
DATE OF BIRTH:
If adult, ADDRESS:
If adult, PHONE:
NAME:
DATE OF BIRTH:
If adult, ADDRESS:
If adult, PHONE:
NAME:
DATE OF BIRTH:
If adult, ADDRESS:
If adult, PHONE:
NAME:
DATE OF BIRTH:
If adult, ADDRESS:
If adult, PHONE:
NAME:
DATE OF BIRTH:
If adult, ADDRESS:
If adult, PHONE:

<u>WILL</u>

Spouse #1 EXECUTOR:
SUCCESSOR EXECUTOR:
SUCCESSOR EXECUTOR:
Spouse #2 EXECUTOR:
SUCCESSOR EXECUTOR:
SUCCESSOR EXECUTOR:
GUARDIAN:
GUARDIAN ADDRESS:
If guardian is married and they die, do you want their spouse as a successor?
SUCCESSOR GUARDIAN:
SUCCESSOR GUARDIAN ADDRESS:
If guardian is married and they die, do you want their spouse as a successor?

ASSETS (cash, checking, savings, stocks/bonds, retirement, fixed – home, cars, personal prop)

Asset	Rough Value	Husband	Wife	Joint	Beneficiary