



_____, 20____

**ESTATE PLANNING
DATA QUESTIONNAIRE
FOR**

The Following Is A List Of Questions We Would Recommend That You Try To Answer Prior To Meeting With An Estate Attorney To Draft Your Estate Documents:

1. Whom Would You Name As Personal Representatives (Executors And Executrixes) In Your Will?

Primary: _____

Contingent: _____

Tertiary: _____

2. Whom Would You Name As Guardians To Raise Your Children In The Event Of Both Of Your Premature Deaths?

Primary: _____

Contingent: _____

Tertiary: _____

3. Whom Would You Name As Trustees To Manage Money On Behalf Of Your Survivors In The Event Of One Or Both Of Your Premature Deaths?

Primary: _____

Contingent: _____

Tertiary: _____

4. What Would Be Your Children's Ages When You Would Feel Comfortable Having Them Receive Money From Your Estates?

Age

Percentage Of Estate

5. Who Would Receive The Proceeds Of Your Estate Should All Of Your Immediate Family Pass Away Prematurely?

6. Are You Willing To Position Your Estate So That Through The Use Of A Credit Trust, Life Insurance And/Or Gifting (Gifting Would Take Place A Few Years In The Future), Your Children Would Receive More Assets Upon Both Of Your Deaths?

7. Are You Concerned If One Of You Should Pass Away Prematurely And The Survivor Remarries, That The Assets, Which You Own, Pass To The Children?

a. If So, Would You Be Willing To Establish A Q-Tip Trust (A Qtip Trust Is Especially Suited For Estate Owners Who Have Children From A Prior Marriage Or Are Concerned That A Spouse May Not Be Able To Manage Assets In The Future) To Accomplish That Objective?

8. Do You Want To Obtain A Living Will?

9. Do You Want A Power Of Attorney For Financial Purposes?

a. Whom Would You Name As Primary And Contingent Attorneys In Fact To Act For Your Financial Needs?

10. Do You Want A Power Of Attorney For Health Care?

a. Whom Would You Name As Primary And Contingent Attorneys In Fact To Act For Your Health Care Needs?

11. Do You Want To Establish A Gifting Program To Any Individuals?

<u>Name</u>	<u>Annual Amount</u>
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12. Do You Want To Gift To Any Charities?

13. Do You Want To Establish A Retirement Plan Trust (Allows Retirement Plan Assets To Be Used For The Unified Credit Exclusion)?

14. Do You Want To Make An Anatomical Gift?
