

Susanne Starr Goodman Law Office, LLC
thoughtful estate planning

1 W. Water St. Ste 275, St. Paul, MN 55107
anne@susannestarrgoodmanlawoffice.com

651-210-7060
susannestarrgoodmanlawoffice.com

Estate Planning Questionnaire

Please complete this questionnaire prior to our meeting. If you are unsure of any answers, please indicate that so we can discuss them. I rely upon you to provide complete and accurate information. Otherwise, the advice I give you may not be appropriate for your situation. All information will be treated as confidential.

1. Personal Information

Client Name: _____ Date of Birth: _____

U.S. Citizen? Yes ___ No ___

Client Name: _____ Date of Birth: _____

U.S. Citizen? Yes ___ No ___

Street Address: _____ Apt: _____ County: _____

City: _____ State: _____ Zip: _____

Telephone Numbers: Home: _____ Work: _____ Cell: _____

E-mail Address: _____

2. Marriage

If there is more than one client, are you married to each other? Yes ___ No ___ N/A ___

Have you ever been divorced? Yes ___ No ___ N/A ___

Do you have a spouse who is not seeking my representation? Yes ___ No ___ N/A ___

3. Children - Please list all of your children, including those who are deceased, born out of wedlock, or whom you wish to omit from your estate plan. Indicate if any child is the legal child of only one of you.

<u>Name of Child</u>	<u>Date of Birth</u>	<u>Address</u>
_____	_____	_____
_____	_____	_____

Is there any reason not to treat your children equally? Do you have any special concerns about a particular child? Are any of your children under a disability? If yes, please explain.

Do you have any special wishes for the care and education of your children?

Who should be the guardian of your minor children? A guardian has physical and legal control over your children until they reach the age of 18.

First Choice: _____ Relationship: _____

Address: _____

Second Choice: _____ Relationship: _____

Address: _____

Do you want the guardian to have complete control of your children's finances?

Yes ___ No ___ Unsure ___

4. Personal Representative - A personal representative ("executor") is responsible for probating your will, paying your debts, collecting your assets, and settling your estate.

First Choice: _____ Relationship: _____

Address: _____

Second Choice: _____ Relationship: _____

Address: _____

5. Financial Inventory – The following asset and liability tables are essential to developing an appropriate estate plan. Please provide exact values when available. If you must estimate values, please indicate so with an asterisk.

ASSETS	NAME:	NAME:	JOINT
Home			
Other Real Estate			
Checking Account			
Savings Account			
Money Market Account			
Automobile			
Personal Property			
Stocks & Bonds			
Closely Held Business			
Life Insurance (Face)			
IRA			
Pension			
Profit Sharing/401k			
Annuities			
529 Plan			
Other Assets:			
TOTAL			

LIABILITIES	NAME:	NAME:	JOINT
Home Mortgage			
Other Mortgages			
Debts To Family Members			
Credit Cards			
Other (Please Describe):			
TOTAL LIABILITIES			

Do you own or plan to acquire property in another state, tax shelters, or interests in a business or farm?

No ___ Yes ___ Please describe: _____

Do you anticipate receiving a substantial inheritance in the next ten years?

No ___ Yes ___ Please describe: _____

Do you own any property or hold any accounts jointly with any person other than your spouse?

No ___ Yes ___ Please describe: _____

Does your employer offer a stock option plan?

No ___ Yes ___ Please describe: _____

Do you hold a power of appointment over any trust?

No ___ Yes ___ Please describe: _____

Have you made gifts over \$10,000 to any individual?

No ___ Yes ___ Please describe: _____

6. Beneficiary Designations

Life Insurance:

Policy Name,# & Type (e.g. whole life, universal life, business travel accident, etc)	Death Benefit & Current Cash Surrender Value	Owner	Insured	Beneficiaries
1.				
2.				
3.				
4.				
5.				

Retirement, Deferred Compensation, and Employee Stock Purchase Plans and Accounts:

Plan or Account Name	Current Value/ Death Benefit	Primary Beneficiary	Contingent Beneficiaries
1.			
2.			
3.			
4.			
5.			

7. Discussion Points

In addition to the questions raised above, we will discuss:

- What are the primary goals of your estate plan?
- To whom would you leave your personal property, real estate and the remainder of your estate if your spouse/partner survives you? Would you wish to control the disposition of any property after the death of your surviving spouse/partner? How would you leave your estate if your spouse/partner does not survive you?
- If you are the owner of a business, are there directions you would give for its continued operation?
- Do you wish to establish a trust for either your spouse/partner or your children?
- Do you have specific requests for your funeral?
- Do you wish to plan for possible incapacity through a health care directive, power of attorney or revocable trust?

8. Supporting Documents

The following documents will be needed for completing your estate planning:

- Any current or prior wills or trusts.
- Any divorce decree or agreement requiring that you support your former spouse or children.
- Any gift tax returns you have filed.
- Any premarital agreements you have signed.

In addition, it is advisable but not required that you provide supporting documentation for the assets and liabilities listed in part 5. This would include bank statements, retirement account reports and summary plan descriptions, stock and bond account reports, and deeds to each piece of real estate that you own.

Thank you for taking the time to complete this questionnaire.
I look forward to the opportunity to work with you.