

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

NAME :		AGE :
SPOUSE NAME :		AGE :
ADDRESS :		
CITY & ZIP :	PHONE : ()	
EMAIL :		
LENGTH OF THIS MARRIAGE :	& OF PRIOR MARRIAGES :	
ARE YOU A CITIZEN OF THE USA?	IS YOUR SPOUSE?	
YEAR YOU BECAME A CALIFORNIA RESIDENT :		
OCCUPATION :	RETIRED?	
SPOUSE OCCUPATION :	RETIRED?	
NAMES OF ALL OF YOUR CHILDREN OF THIS MARRIAGE (EVEN THOUGH THEY MAY NOT INHERIT.)		
NAMES OF ALL CHILDREN FROM PRIOR MARRIAGES (EVEN THOUGH THEY MAY NOT INHERIT) ALSO INDICATE WHICH SPOUSE IS THE PARENT		
WHO WILL BE GUARDIAN OF YOUR MINOR CHILDREN :		
NAME(S) OF DECEASED CHILDREN :		AGE AT DEATH :
# OF GRANDCHILDREN BY DECEASED CHILDREN :	# OF DISABLED CHILDREN :	
# OF DISABLED CHILDREN RECEIVING SSI OR OTHER BENEFITS :		
NAME(S) OF ALL CHILDREN ADOPTED BY YOU _____ OR FROM YOU _____ :		
NAME(S) OF YOUR STEP\FOSTER CHILDREN :		

WHO WILL INHERIT FROM YOU: CHILDREN ONLY? Yes__ No__ ALL EQUALLY? Yes__ NO__		
NAMES OF OTHER PERSONS NOT LISTED ABOVE TO INHERIT FROM YOU: <div style="border: 1px solid black; height: 40px; width: 100%;"></div>		
NAME(S) OF SUCCESSOR TRUSTEE(S) :		
ASSETS		
<u>REAL ESTATE</u> Include primary residence, rental property, vacant land, etc.		
ADDRESS	APPROX. VALUE	AMT. OWED
DO YOU OWN A BUSINESS?		
LIST APPROXIMATE BALANCES OR TOTAL VALUE FOR THE FOLLOWING ASSETS :		
CHECKING ACCTS:\$	SAVINGS ACCTS:\$	
STOCKS & MUTUAL FUNDS:\$	BONDS:\$	
CD'S & MONEY MARKET FUNDS:\$	IRAs:\$	
RETIREMENT PLANS:\$	ANNUITIES:\$	
DEBTS (INCLUDING NOTES) OWED TO YOU:\$		
LIMITED PARTNERSHIPS (INCLUDING REAL ESTATE):\$		
LIFE INSURANCE POLICIES (TOTAL FACE VALUE):\$		
MOBILE HOMES, RV'S, BOATS:\$		
COLLECTIONS (COINS, GUNS, ART, ETC.):\$		
ALL OTHER PERSONAL PROPERTY, DEPOSITS, INVESTMENTS, & ASSETS NOT LISTED ABOVE: \$		
NAMES OF ALL JOINT OWNERS OF ANY PROPERTY/ASSET OTHER THAN SPOUSE:		
APPROXIMATE TOTAL VALUE OF ESTATE:\$		