

## My Estate Planning Questions

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Goals: \_\_\_\_\_

Family Dynamics: \_\_\_\_\_

Potential Problems: \_\_\_\_\_

Documents Needed: \_\_\_\_\_

Fee: \_\_\_\_\_

Fee Agreement Signed:

Yes

No

Any Prior Documents?

Full Legal Names: \_\_\_\_\_

Are you married? Y/N

Spouses Name: \_\_\_\_\_

Former Spouses: \_\_\_\_\_

# of Children: \_\_\_\_\_

Children's Names: \_\_\_\_\_

# of Grandchildren: \_\_\_\_\_

Property/Assets You Own and Approximate Value of Estate Assets (need address for real estate):

Debts Owed:

Trust:

Purpose for Trust: \_\_\_\_\_

Name of Trust: \_\_\_\_\_

Trustee(s): \_\_\_\_\_

Successor Trustee(s): \_\_\_\_\_  
(During Incapacity)

Successor Trustee(s): \_\_\_\_\_  
(After Death)

Are there any people financially dependant on you? Y/N

If so, who and to what extent? \_\_\_\_\_

Would you like trustee to continue those payments? \_\_\_\_\_

What should happen to trust upon your death? Should Trust assets be distributed or remain in trust? \_\_\_\_\_

How/When should assets be distributed? \_\_\_\_\_

If beneficiary is deceased should gift lapse or go right of rep?

Can Trustee Publish Notice to Creditors if in best interest of Trust/Beneficiaries?

Do you want all of your property to be held by the trust or just the real estate?

Is Pour Over Will needed or regular Will?  
Do you have life insurance? Y/N

Who are the beneficiaries? \_\_\_\_\_

Would you like the proceeds to go into the trust instead of to beneficiaries? \_\_\_\_\_

Do you want the Trustee to be compensated for their services? Y/N

If so, how do you want them to be compensated? "Fair and Reasonable" or a specific

Amount: \_\_\_\_\_

Any Other Concerns/Provisions for Trust: \_\_\_\_\_

**I will need legal descriptions of all Real Estate that is to go into trust. Talk about title insurance potential problem.**

DPA Who? \_\_\_\_\_

Backup: \_\_\_\_\_

DPA Override HD? \_\_\_\_\_

Health Care Directive:

Want life artificially preserved \_\_\_\_\_

Any Specific Requests \_\_\_\_\_

Will:

Probate vs. Non Probate

Regular Will vs. Pourover Will

Personal Property: Separate list OR in Will?

Any Specific Gifts?

Residue:

Explain what and why survive 30 days

Who to? \_\_\_\_\_

Back up? \_\_\_\_\_

If to children in = shares? \_\_\_\_\_  
If beneficiary does not survive does share go to their descendants OR to residue?

Personal Rep:

Serve without Bond? \_\_\_\_\_

Compensated? \_\_\_\_\_

Who? \_\_\_\_\_

Back-Up \_\_\_\_\_

Non-Intervention Powers? \_\_\_\_\_

Care and Custody of Children:

Who? \_\_\_\_\_

Back-up? \_\_\_\_\_  
Last decided by child and fam? \_\_\_\_\_

Any Special concerns? \_\_\_\_\_

Any Specific requests for burial/funeral arrangements? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Any questions for me? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

How will documents be reviewed? \_\_\_\_\_

Email Address if applicable: \_\_\_\_\_

When will documents be executed (need 2 witnesses) \_\_\_\_\_