



F
LETCHER LAW FIRM, P.A.

ESTATE PLAN QUESTIONNAIRE
(Confidential)

FAMILY INFORMATION

Full Name: _____

Address: _____

City State County Zip Code

Phone: _____ (Home) _____ (Business)

Date of Birth: _____ Place of Birth: _____

Social Security Number: _____

Name of Spouse: _____

Date of Birth: _____ Place of Birth: _____

Social Security Number: _____

CHILDREN

<u>Name</u>	<u>Address</u>	<u>Date of Birth</u>	<u>Date of Death (If Deceased)</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

GRANDCHILDREN

<u>Name</u>	<u>Age</u>	<u>Parent</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Names of Living Relatives, Parents, Brothers, Sisters, Other Relatives:

<u>Name</u>	<u>Address</u>	<u>Relationship</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

ASSET INFORMATION

Breakdown of Assets:

	<u>Value</u>	<u>Held (J for Jointly, H for Husband, W for Wife)</u>
Cash and cash equivalents	\$ _____	_____
Investments	_____	_____
Residence	_____	_____
Less Mortgage	_____	_____
Other Real Property	_____	_____
Personal Property	_____	_____
Notes Receivable	_____	_____
Pension Plan	_____	_____
Accrued Benefit	_____	_____
Beneficiary	_____	_____
IRA -		
Account Balance	_____	_____
Beneficiary	_____	_____

Life Insurance -

Face Amount _____

Owner _____

Beneficiary _____

Life Insurance - _____

Face Amount _____

Owner _____

Beneficiary _____

SPECIAL GIFTS

Generally, it is better to make distribution by percentages. However, if there is a specific item, parcel of land or sum of money to go to someone, this should be stated. Items should be described in detail.

<u>Name</u>	<u>Address</u>	<u>Item, Property or Sum of Money</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

RESIDUARY ESTATE

This is the rest of your property after specific gifts are made.

<u>Person</u>	<u>Address</u>	<u>Percentage</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

ADMINISTRATION

- 1. Executor: An executor is one who is appointed by you to carry out the terms of your Will. If your Will does not name an executor, the court will appoint an administrator. This may not be the one you would have chosen, so exercise the right to name the person you want.

Due to unforeseen circumstances, it is well to name an alternate.

Name of Executor

Name of Alternate Executor

Address

Address

- 2. Trustee: If you establish a trust in your Will, a trustee should be named. You should also name an alternate.

Name of Trustee

Name of Alternate Trustee

Address

Address

When will trust terminate? _____

- 3. Guardian: If you have minor children, the Will should name a guardian.

Name of Guardian

Name of Alternate Guardian

Address

Address

