

# GOTHARD WATERS

ATTORNEYS AT LAW

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Appointment Date: \_\_\_\_\_ Time: \_\_\_\_\_

## **CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE**

Full Legal Name: \_\_\_\_\_

Age: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ US Citizen? \_\_\_\_\_

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

*Street or P.O. Box Number*

*City*

*State*

*Zip*

*County*

Telephone: (Home) \_\_\_\_\_ (Work) \_\_\_\_\_

(Cell) \_\_\_\_\_

Email Address: \_\_\_\_\_ Is this a work email? \_\_\_\_\_

Do you consent to the transmission of confidential information to you via email? Yes \_\_\_\_\_ No \_\_\_\_\_

Occupation/Employer (former if retired): \_\_\_\_\_

Prior Marriages: \_\_\_\_\_

Any legal obligations from a previous marriage, i.e., life insurance? If so, please bring a copy of your divorce decree with you. \_\_\_\_\_

Is/was Spouse a Veteran? \_\_\_\_\_

Do any of your family members have special medical needs? \_\_\_\_\_

Do you conduct any important transactions electronically (i.e. paying utilities, monitoring investments, etc.)? \_\_\_\_\_

Do you have any social media accounts that are important to you (i.e. Facebook, Twitter, etc.)? \_\_\_\_\_

Have you ever filed for bankruptcy? \_\_\_\_\_

### **Full Legal Names of Children:**

A. \_\_\_\_\_ Age: \_\_\_\_\_

Name of child's spouse (if any): \_\_\_\_\_

Grandchildren and Ages: \_\_\_\_\_

B. \_\_\_\_\_ Age: \_\_\_\_\_

Name of child's spouse (if any): \_\_\_\_\_

Grandchildren and Ages: \_\_\_\_\_

C. \_\_\_\_\_ Age: \_\_\_\_\_

Name of child's spouse (if any): \_\_\_\_\_

Grandchildren and Ages: \_\_\_\_\_

D. \_\_\_\_\_ Age: \_\_\_\_\_

Name of child's spouse (if any): \_\_\_\_\_

Grandchildren and Ages: \_\_\_\_\_

Do you have an existing will? Yes \_\_\_\_\_ No \_\_\_\_\_ (If yes, please bring a copy)

Have you ever signed a living trust? Yes \_\_\_\_\_ No \_\_\_\_\_ (If yes, please bring a copy)

Do you anticipate receiving an inheritance? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you have an Irrevocable Life Insurance Trust? Yes \_\_\_\_\_ No \_\_\_\_\_ (If yes, please bring a copy)

Please list any specific items or amounts that you wish to give to any individuals or organization in your Will (other than children):

<u>Name:</u>	<u>Item or Amount:</u>
_____	_____
_____	_____
_____	_____

Who will serve as your **Executor(s)**? (*This is the person who handles your estate when you die, and it may be more than one person*)

Primary(ies): \_\_\_\_\_

Alternate(s) (if above person(s) unable to serve): \_\_\_\_\_

Who will be **Guardian(s)** of your minor children, if applicable? (*Who will your children live with if you die?*) \_\_\_\_\_

Alternate(s) (if above person(s) unable to serve): \_\_\_\_\_

Who will be the **Trustee(s)** of the assets you leave for your children until they are old enough to manage their own money? \_\_\_\_\_

Alternate(s) (if above person(s) unable to serve): \_\_\_\_\_

*(We recommend that most assets remain in a Trust for the children, if your children are under the age of 35, with a portion of the assets released to them over the course of several years; perhaps distributions at ages 25, 30, and 35, or older. The Trustee controls how the money is used until that time, paying for any necessary expenses such as purchase of an automobile, post-high school education or training, college, monthly allowance, etc.)*

Do you wish to leave any assets directly to grandchildren? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you want to include any step-grandchildren in your wills? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you own any property in another state? Yes \_\_\_\_\_ No \_\_\_\_\_

**Advisors:**

Accountant: \_\_\_\_\_

Insurance Agent: \_\_\_\_\_

Investment Advisor: \_\_\_\_\_

Were you referred by anyone? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, who? \_\_\_\_\_

If not, how did you hear about us? \_\_\_\_\_

Is it ok for us to thank the person who referred you? Yes \_\_\_\_\_ No \_\_\_\_\_

**IDENTIFICATION OF ASSETS**  
(Attach additional pages if necessary)

**Ownership/Approximate Values**

**Real Estate:**

Residence: *(Please bring a copy of your deed with you.)*

\_\_\_\_\_

Approximate mortgage balance on home: \_\_\_\_\_

Estimated value of furnishings: \_\_\_\_\_

Other real estate:

*(Please give location, acreage, and improvements. Please bring a copy of your deeds with you.)*

A. \_\_\_\_\_

B. \_\_\_\_\_

C. \_\_\_\_\_

C. \_\_\_\_\_

**Bank Accounts, Certificates of Deposit,**

**Money Market Funds, etc.:**

*(Please give name of bank or institution, type of account, any co-owners, beneficiaries/PODs\*, and approximate balance.)*

A. \_\_\_\_\_

B. \_\_\_\_\_

C. \_\_\_\_\_

D. \_\_\_\_\_

\* Pay on death designation

**Retirement Accounts, IRAs, 401(k):**

*(Please give name of bank or institution, type of account, any co-owners, beneficiaries/PODs\*, and approximate balance.)*

A. \_\_\_\_\_

B. \_\_\_\_\_

C. \_\_\_\_\_

\* Pay on death designation

**Stocks, Bonds, Mutual Funds:**

*(Please bring copies of most recent statements.)*

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_

**Ownership of Business:**

*(examples: Corporation, LLC, Partnership)*

Name of Business and Percentage of Ownership *(Please attach copies of documentation.)*

- A. \_\_\_\_\_
- B. \_\_\_\_\_

**Automobiles, Trucks, Boats:**

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_
- D. \_\_\_\_\_

**Farm Equipment/Livestock:**

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_

**Accounts Receivable:**

*(Mortgages, notes, or debts owed to you. Please list debtor's name, date loan made, and approximate balance remaining.)*

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_

**Digital Assets:**

*(Example: digital assets, such as domain names, blogs, etc.)*

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_

**Debts:**

*(List any mortgages or other substantial debts owed by you that are not shown above.)*

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_

**Life Insurance Policies:**

Company	Face Value	Cash Value	Person Insured	Policy Owner	Beneficiary	Loan Against Policy
A.	_____	_____	_____	_____	_____	_____
B.	_____	_____	_____	_____	_____	_____
C.	_____	_____	_____	_____	_____	_____

I certify that all of my assets are listed on this form.

\_\_\_\_\_

Date: \_\_\_\_\_

*Last updated September 17, 2018*