

Date: _____

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

1. Full Name _____
Home address _____

Home phone _____
Occupation _____
Work address _____

Work phone _____
Social Security No. _____
Date + Place of Birth _____
Citizenship _____
Period of Residence in California _____
If less than 10 years, note prior residence _____

2. Previous Marriage(s):
Yes _____ No _____
Prior Spouse's name _____
Date of death or divorce _____

3. Do you have children? If so, please provide the following information.

Name	Address	Birthdate
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

4. Do you have grandchildren? If so, please provide the following information.

Names of Grandchildren

Name of Parents

Birthdate

5. Please list any other relatives, friends, or other individuals who may be dependent on you for support, or for whom you may wish to provide.

Name

Relationship

Address

Birthdate

6. Professional Advisers (Please include name, address and phone number):

a) Other Attorney _____

b) Accountant / Tax Adviser _____

c) Investment Adviser / Broker _____

7. Asset Summary:

a) Do you have a safe-deposit Box? _____ If so, where? _____

In whose name(s): _____

b) Cash & Bank Balances:

Name of Bank and
address

Account No./Type of
Account

Amount

Form of Ownership
(or with whom?)

c) Notes and Accounts Receivable:
Include details (amount, payor, payee, date) of all items over \$100.00 payable to you.

d) Securities (stocks, bonds, etc.). Attach separate list, if necessary:

Shares/ Face value	Name of Company	Held in Name of	Value
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e) Real Estate:

1) Residence:

Location	Held in Name of	Form of Ownership	Approx Value
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2) Vacation:

Location	Held in Name of	Form of Ownership	Approx Value
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3) Other (Rental, Business):

Location	Held in Name of	Form of Ownership	Approx Value
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f) Business Interests:

Briefly describe any interest you may have in a partnership, a sole proprietorship or closely held corporation and indicate present value of interest. _____

Total \$ _____

g) Retirement Plans:

Briefly describe source, amount and present beneficiary provisions or attach separate data. Include, for example, pension and profit sharing plans, stock options, employee benefits, etc.

h) Interest in Trusts:

i) Inheritance:

Briefly describe any property you anticipate inheriting.

j) Personal property (indicate how ownership is held):

		Form of Ownership	Approx. Value
Home Furnishings	_____	_____	_____
Automobiles	_____	_____	_____
Jewels/Furs	_____	_____	_____
Other items	_____	_____	_____

8. Liabilities:

a) Loans, including mortgages

Creditor	Secured By	Interest Rate	Current Balance
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

b) Other Debts _____

9. Please describe any gifts you have made to any individual of more than \$10,000 in any one year.

Date	Recipient	Description	Value

10. Please describe any trusts or custodian accounts for your children.

ADDITIONAL INFORMATION DESIRED:

1. Copies of present Wills
2. Prior gift tax returns, if any
3. Copies of trust agreements in which you are donor or beneficiary

11. Life Insurance (Owned by you, on your life or which names you as beneficiary):

	Insurance Company	Policy Number	Type of Policy	Face Amount	Owner	Insured	Beneficiaries	Cash Surrender Value	Loans Against Policies
1.									
2.									
3.									
4.									
5.									