

HUSBAND AND WIFE ESTATE PLANNING QUESTIONNAIRE
PLEASE PRINT LEGIBLY

HUSBAND'S FULL NAME: _____

U.S. Citizen? _____

WIFE'S FULL NAME: _____

U.S. Citizen? _____

PREPARING REVOCABLE LIVING TRUST OR WILLS? _____

ADDRESS:

STREET: _____

CITY: _____

COUNTY: _____

ZIP CODE: _____

HUSBAND'S CELL NUMBER: _____

WIFE'S CELL NUMBER _____

E MAIL: _____

CHILDREN OF THIS MARRIAGE: (Use full legal names.)

	NAME	CURRENTLY LIVING? Y/N	MALE OR FEMALE
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____

HUSBAND'S CHILDREN FROM A PRIOR MARRIAGE OR RELATIONSHIP (Use full legal names.):

	NAME	CURRENTLY LIVING? Y/N	MALE OR FEMALE
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____

WIFE'S CHILDREN FROM A PRIOR MARRIAGE OR RELATIONSHIP (Use full legal names.):

	NAME	CURRENTLY LIVING? Y/N	MALE OR FEMALE
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____

FINANCIAL DECISION MAKERS:

WHO DO YOU WANT TO HANDLE YOUR FINANCES IF YOU BECOME MENTALLY INCOMPETENT, OR UPON YOUR DEATH? THE SPOUSE IS USUALLY FIRST, BUT IF THE SPOUSE HAS MENTAL COMPETENCY ISSUES, OR IS SEVERELY ILL, YOU MAY WANT TO CONSIDER HAVING SOMEONE ELSE MAKE YOUR FINANCIAL DECISIONS. YOUR DECISION MAKERS SHOULD BE MATURE ENOUGH TO COMPETENTLY HANDLE YOUR AFFAIRS. THE DECISION MAKER MUST BE AT LEAST 18 YEARS OF AGE, AND MOST CLIENTS SELECT SOMEONE AGE 25 OR OLDER. YOU CAN HAVE CO-AGENTS TO HANDLE YOUR FINANCES. IF YOU WANT CO-AGENTS, PUT AN "X" IN THE INDICATED AREA. YOU SHOULD HAVE AT LEAST ONE AGENT TO HANDLE YOUR FINANCES, WITH PREFERABLY AT LEAST ONE BACKUP PERSON. (You do not have to have 5 agents.)

HUSBAND'S FINANCIAL DECISION MAKERS: (Use full legal names.)

C O -
AGEN
T?

- | | | |
|----|-------|-------|
| 1. | _____ | _____ |
| 2. | _____ | _____ |
| 3. | _____ | _____ |
| 4. | _____ | _____ |
| 5. | _____ | _____ |

WIFE'S FINANCIAL DECISION MAKERS: (Use full legal names.)

C O -
AGEN
T?

- | | | |
|----|-------|-------|
| 1. | _____ | _____ |
| 2. | _____ | _____ |
| 3. | _____ | _____ |
| 4. | _____ | _____ |
| 5. | _____ | _____ |

HEALTH CARE DECISION MAKERS:

WHO DO YOU WANT TO MAKE HEALTH CARE DECISIONS FOR YOU IF YOU BECOME MENTALLY INCOMPETENT, AND CANNOT MAKE HEALTH CARE DECISIONS FOR YOURSELF? ONE OF THE GOALS OF A GOOD ESTATE PLAN IS TO TAKE MEASURES TO TRY TO PREVENT THE NEED FOR A LEGAL GUARDIAN IN THE EVENT OF YOUR INCAPACITY. A GUARDIANSHIP CAN BE EXPENSIVE AND A LOT OF WORK FOR THE GUARDIAN IN HAVING TO MAKE ANNUAL ACCOUNTINGS TO A PROBATE COURT. BY HAVING THE RIGHT HEALTH CARE AND FINANCIAL DOCUMENTS IN PLACE, THE NEED FOR A GUARDIAN CAN POSSIBLY BE ELIMINATED ALTOGETHER. YOU CANNOT HAVE CO-AGENTS FOR HEATH CARE. THE SPOUSE IS USUALLY FIRST, BUT IF THE SPOUSE HAS MENTAL COMPETENCY ISSUES, OR IS SEVERELY ILL, YOU MAY WANT TO CONSIDER HAVING SOMEONE ELSE MAKE YOUR HEALTH CARE DECISIONS. YOU SHOULD HAVE AT LEAST ONE AGENT TO HANDLE YOUR HEALTH CARE, WITH PREFERABLY AT LEAST ONE BACKUP PERSON. (You do not have to have 5 agents.)

HUSBAND’S HEALTH CARE DECISION MAKERS: (Use full legal names.)

1. _____
2. _____
3. _____
4. _____
5. _____

WIFE’S HEALTH CARE DECISION MAKERS: (Use full legal names.)

1. _____
2. _____
3. _____
4. _____
5. _____

SPOUSAL USE OF PROPERTY AFTER YOUR DEMISE:

QUESTION FOR HUSBAND: Y/N

DO YOU WANT YOUR WIFE TO USE YOUR PROPERTY FOR HER HEALTH, MAINTENANCE AND SUPPORT AFTER YOUR DEATH? _____

QUESTION FOR WIFE: Y/N

DO YOU WANT YOUR HUSBAND TO USE YOUR PROPERTY FOR HIS HEALTH, MAINTENANCE AND SUPPORT AFTER YOUR DEATH? _____

BENEFICIARIES:

YOU SHOULD USE PERCENTAGES IN THIS SECTION, BECAUSE YOU DO NOT KNOW THE SIZE OF YOUR ESTATE WHEN YOU DIE, AND BY USING PERCENTAGES, YOU WILL BE ASSURED OF GIVING AWAY 100% OF YOUR ESTATE.

BENEFICIARIES OF THE HUSBAND: %

IF WIFE IS THEN LIVING, WHAT PERCENTAGE TO WIFE? _____

ALTERNATE BENEFICIARIES IF WIFE IS NOT THEN LIVING:

- 1. _____ _____
- 2. _____ _____
- 3. _____ _____
- 4. _____ _____
- 5. _____ _____
- 6. _____ _____
- 7. _____ _____
- 8. _____ _____
- 9. _____ _____
- 10. _____ _____

BENEFICIARIES OF THE WIFE: _____ %
If HUSBAND IS THEN LIVING, WHAT PERCENTAGE TO HIM? _____

ALTERNATE BENEFICIARIES IF HUSBAND IS NOT THEN LIVING:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

GUARDIANS OF MINOR OR SPECIAL NEEDS CHILDREN

IF YOU HAVE MINOR CHILDREN, YOU WILL NEED TO DESIGNATE A PERSON(S) TO BE THE LEGAL GUARDIAN OF YOUR CHILDREN IF BOTH OF YOU ARE DECEASED. IF YOU ARE THE GUARDIAN OF AN ADULT SPECIAL NEEDS CHILD, YOU CAN ALSO DESIGNATE WHOM YOU WOULD LIKE TO BE THE NEXT GUARDIAN OF THAT CHILD. YOU CAN DESIGNATE AN INDIVIDUAL - EITHER SINGLE OR MARRIED, OR A MARRIED COUPLE.

HUSBAND'S DESIGNATED GUARDIANS (PUT A MARRIED COUPLE ON ONE LINE):

1. _____
2. _____

WIFE'S DESIGNATED GUARDIANS (PUT A MARRIED COUPLE ON ONE LINE):

1. _____
2. _____

SPECIFIC BEQUESTS OF PROPERTY: DO EITHER OF YOU DESIRE TO LEAVE SPECIFIC ASSETS TO SOMEONE? FOR INSTANCE, A CERTAIN REAL ESTATE TRACT, MOTOR VEHICLES, OR CASH. SMALL ITEMS AROUND THE HOME CAN BE GIVEN AWAY VIA A HAND WRITTEN MEMORANDUM.

SPECIFIC BEQUESTS OF THE HUSBAND:

SPECIFIC BEQUESTS OF THE WIFE:

SIZE OF THE ESTATE: THIS IS NECESSARY TO DETERMINE IF THERE IS A NEED IN YOUR ESTATE PLAN TO HAVE THE DOCUMENTS DRAFTED TO SAVE ON ESTATE TAXES.

YOUR ESTATE CONSISTS OF LIFE INSURANCE, RETIREMENT PLANS SUCH AS SEPS, 401Ks, IRAs, REAL ESTATE, CASH, CERTIFICATES OF DEPOSIT, MONEY MARKET FUNDS, BONDS, STOCKS, MUTUAL FUNDS, MINERAL INTERESTS, MOTOR VEHICLES AND PATENTS.

TOTAL VALUE OF THE ESTATE: _____

