

**KISELSTEIN FRANCKOWIAK LAW GROUP**

Estate Planning Attorneys

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*"for your peace of mind"*

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**ESTATE PLANNING NEW CLIENT QUESTIONNAIRE**

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

(The information provided on this document is **CONFIDENTIAL**. The attorney/client privilege prohibits your attorney from disclosing its contents to anyone). If any question does not apply, please indicate as n/a or leave blank. If you have any questions while completing the application, please contact our office.

**PERSONAL INFORMATION**

Full Legal Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Other Names used (and nicknames) \_\_\_\_\_ Citizenship \_\_\_\_\_

Home Address \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_ Email \_\_\_\_\_

Home Phone \_\_\_\_\_ Business Phone \_\_\_\_\_ Cell \_\_\_\_\_

Employer \_\_\_\_\_ Position \_\_\_\_\_

Business Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Marital Status \_\_\_\_\_

**SPOUSE (If not married, please leave blank)**

Full Legal Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Other Names used (and nicknames) \_\_\_\_\_ Citizenship \_\_\_\_\_

Home Address \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_ Email \_\_\_\_\_

Home Phone \_\_\_\_\_ Business Phone \_\_\_\_\_ Cell \_\_\_\_\_

Employer \_\_\_\_\_ Position \_\_\_\_\_

Business Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## CHILDREN

Please provide the full legal names of your children. Indicate the parent of each child by marking "JT" if both spouses are the parents, or the initials of the parent. Indicate if any special needs or concerns.

1. Name \_\_\_\_\_ Phone \_\_\_\_\_  
Address \_\_\_\_\_ Parent \_\_\_\_\_ Birth Date \_\_\_\_\_  
Special Concerns \_\_\_\_\_  
Ages of Grandchildren \_\_\_\_\_

2. Name \_\_\_\_\_ Phone \_\_\_\_\_  
Address \_\_\_\_\_ Parent \_\_\_\_\_ Birth Date \_\_\_\_\_  
Special Concerns \_\_\_\_\_  
Ages of Grandchildren \_\_\_\_\_

3. Name \_\_\_\_\_ Phone \_\_\_\_\_  
Address \_\_\_\_\_ Parent \_\_\_\_\_ Birth Date \_\_\_\_\_  
Special Concerns \_\_\_\_\_  
Ages of Grandchildren \_\_\_\_\_

4. Name \_\_\_\_\_ Phone \_\_\_\_\_  
Address \_\_\_\_\_ Parent \_\_\_\_\_ Birth Date \_\_\_\_\_  
Special Concerns \_\_\_\_\_  
Ages of Grandchildren \_\_\_\_\_

5. Name \_\_\_\_\_ Phone \_\_\_\_\_  
Address \_\_\_\_\_ Parent \_\_\_\_\_ Birth Date \_\_\_\_\_  
Special Concerns \_\_\_\_\_  
Ages of Grandchildren \_\_\_\_\_

6. Name \_\_\_\_\_ Phone \_\_\_\_\_  
Address \_\_\_\_\_ Parent \_\_\_\_\_ Birth Date \_\_\_\_\_  
Special Concerns \_\_\_\_\_  
Ages of Grandchildren \_\_\_\_\_

Has either spouse been previously married?  YOURSELF  SPOUSE

If previously married, did marriage terminate due to:  Death  Death  
 Divorce  Divorce

If previous marriage terminated by divorce, are there continuing support, retirement plan or insurance obligations that you are receiving or paying?  Yes  No

Do you have a Pre-Nuptial Agreement?  Yes  No

Are you or your spouse receiving Social Security, disability, or other governmental benefits?  Yes  No

*If Yes, please describe:* \_\_\_\_\_

Do you have any children or grandchildren (illegitimate or not), who are not indicated on page 1?  Yes  No

*If Yes, please name:* \_\_\_\_\_

Do you wish to have any children or grandchildren specifically omitted from the distribution of your estate plan after your death?  Yes  No

*If Yes, please name:* \_\_\_\_\_

Do you have any deceased children?  YOURSELF  SPOUSE

*If Yes, please name:* \_\_\_\_\_

*Did they have any children:* \_\_\_\_\_

Do any of your children or grandchildren have a disability which has made them recipients of a government benefits program?  Yes  No

*If Yes, please describe:* \_\_\_\_\_

Do any of your children or grandchildren have special educational, medical or physical needs?  Yes  No

*If Yes, please describe:* \_\_\_\_\_

Do you provide primary or financial support to adult children or others?  Yes  No

Are you interested in including any charitable gifts in your estate plan?  Yes  No

*If Yes, do you have any specific charities in mind?* \_\_\_\_\_

Have you or your spouse signed a Will, Trust, or other estate planning legal documents?  Yes  No

**DETERMINING YOUR ESTATE**

Your estate is equal to the value of all of your personal assets less the value of all of your personal liabilities. In order for us to prepare your estate planning documents properly, we must have an accurate idea as to the size of your estate and the types of assets which comprise your estate. Below, please list each of your assets and liabilities. Please indicate whether the asset or liability is personal to either of you or owned jointly.

<b>ASSETS</b>	<b>OWNED BY YOURSELF</b>	<b>OWNED BY SPOUSE</b>	<b>OWNED JOINTLY</b>
<b>Real Estate</b>			
1. Residence	\$	\$	\$
2. Other	\$	\$	\$
3. Other	\$	\$	\$
<b>Securities (not held in IRA or Retirement Plan)</b>			
Publicly Traded Stocks	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Non-Public Stock	\$	\$	\$
Bonds	\$	\$	\$
Mutual Funds	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Other	\$	\$	\$
Other	\$	\$	\$
<b>Cash, Bank Accounts &amp; Certificates of Deposit</b>			
Money Market Funds	\$	\$	\$
	\$	\$	\$

<b>ASSETS</b>	<b>OWNED BY YOURSELF</b>	<b>OWNED BY SPOUSE</b>	<b>OWNED JOINTLY</b>
Bank Accounts	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Certificates Of Deposit	\$	\$	\$
	\$	\$	\$
<b>Retirement Benefits</b>			
IRA's (Traditional)	\$	\$	\$
IRA's (Roth)			
Qualified Annuities (IRA)	\$	\$	\$
Non-Qualified Annuities (non-IRA)	\$	\$	\$
Retirement Plan <i>(Circle One)</i> (Profit Sharing, Keogh, SEP ESOP, 457(b), 401(k), 403(b))	\$	\$	\$
<b>Partnerships/LLC</b>	\$	\$	\$
<b>Promissory Notes Payable to You</b>	\$	\$	\$
<b>Insurance (Group and Individual)</b>			
Company:	death/cash benefit \$	death/cash benefit \$	death/cash benefit \$
Company:	death/cash benefit \$	death/cash benefit \$	death/cash benefit \$
<b>Anticipated Gifts and Inheritances</b>	\$	\$	\$
<b>Personal Property</b>			
Automobiles	\$	\$	\$
	\$	\$	\$
Jewelry, Art, Furs, Guns, Antiques, (in excess of \$10,000 market value)	\$	\$	\$
<b>TOTAL ASSETS</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

<b>LIABILITIES</b>	<b>OWED BY YOURSELF</b>	<b>OWED BY SPOUSE</b>	<b>OWED JOINTLY</b>
<b>Mortgages Payable</b>			
Address:	\$	\$	\$
Address:	\$	\$	\$
Address:	\$	\$	\$
<b>Outstanding Loans</b>			
Describe:	\$	\$	\$
Describe:	\$	\$	\$
<b>Other</b>			
Describe:	\$	\$	\$
Describe:	\$	\$	\$
<b>TOTAL LIABILITIES</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

**NET VALUE OF ESTATE**

	<b>YOURSELF</b>	<b>SPOUSE</b>	<b>JOINT</b>
<b>TOTAL ASSETS</b> <i>(from bottom of page 5)</i>	<b>\$</b>	<b>\$</b>	<b>\$</b>
<b>TOTAL LIABILITIES</b> <i>(from above)</i>	<b>\$</b>	<b>\$</b>	<b>\$</b>
<b>NET ESTATE</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

## SOURCES OF INCOME

SOURCE OF INCOME	YOURSELF	SPOUSE	JOINT
Salary	\$	\$	\$
Pension	\$	\$	\$
Bonus/Commissions	\$	\$	\$
Dividends/Interest	\$	\$	\$
Other (SS, IRA distributions, etc)	\$	\$	\$
	\$	\$	\$
Net Rental Income	\$	\$	\$
<b>TOTAL INCOME</b>	\$	\$	\$

## ADVISORS

1. Accountant's Name \_\_\_\_\_ Phone Number \_\_\_\_\_  
 Address \_\_\_\_\_ Email \_\_\_\_\_
2. Financial Advisor's Name \_\_\_\_\_ Phone Number \_\_\_\_\_  
 Address \_\_\_\_\_ Email \_\_\_\_\_
3. Life Insurance Agent's Name \_\_\_\_\_ Phone Number \_\_\_\_\_  
 Address \_\_\_\_\_ Email \_\_\_\_\_
4. Other (Describe) \_\_\_\_\_ Phone Number \_\_\_\_\_  
 Address \_\_\_\_\_ Email \_\_\_\_\_

### How did you find us or hear about us:

- Personal Referral/Friend: \_\_\_\_\_
- Professional Referral: \_\_\_\_\_
- Other: \_\_\_\_\_
- Internet Search: \_\_\_\_\_
- Avvo.com

I am ready to proceed with the creation of my Living Trust.

I need questions answered before I am ready to proceed with the creation of my Living Trust.  
(see below)

I am not interested in creating a Living Trust at this time. I need general information only.

Questions:

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**SUCCESSOR TRUSTEE:**

The successor trustee is the individual or trust company who would have title to all of your property and will administer your property during your disability or after your death according to the terms of your living trust. The trustee is responsible for the management and investment of all of your trust property. ***Please consider the names of the people whom you would choose to act as your first choice for Successor Trustee and as an alternate choice for Successor Trustee.***

Name of Successor Trustee \_\_\_\_\_

Address \_\_\_\_\_

Relationship to you: \_\_\_\_\_

**The information provided above is a complete and total list of all of my/our assets and income, that I/we am/are presently aware of at this time.**

\_\_\_\_\_  
Please sign (Yourself)

\_\_\_\_\_  
Please sign (Spouse)