

BLEVINS LAW

ATTORNEYS AT LAW

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ESTATE PLANNING QUESTIONNAIRE

This form is intended to provoke thought and conversation for parties during the estate planning process. You are not required to complete it. An attorney will gladly meet with you at any time during the planning process. However, you may wish to use it as a tool as you prepare for your meeting in order that you can address all the elements of your estate.

1. Please bring copies of any **current Will or Trust** you may have drafted, established or created or which has been established for you.
2. Please provide **basic personal information** with the correct and formal spelling of your names.

_____	_____	_____
Husband's Legal Name	Birthplace	Date of Birth

_____	_____	_____
Wife's Legal Name	Birthplace	Date of Birth

_____	_____	_____
Street Address	Telephone	Date of Marriage

_____	_____	_____	_____	_____
City	State	Zip Code	H's daytime phone	W's Daytime Phone

CHILDRENS' NAMES:

ADDRESS:

BIRTHDATE:

5/24/2011

3. Please select an **Executor** and an alternate Executor to carry out the terms of your Will. The Executor is the person responsible to the Court and to your heirs to properly dispense and distribute your estate in accordance with your Will after your death. Husband and Wife may select one another, then an alternate for when both are deceased.

a. Husband's Executor: 1) _____
Alternate: _____

b. Wife's Executor: 1) _____
Alternate: _____

IF YOU DO NOT HAVE MINOR CHILDREN, SKIP TO QUESTION 6.

4. **Who do you wish to act as Guardian and/or Trustee of your minor children?**

a. The Guardian(s) of Minor Children will physically care for the child:
1) _____
2) _____ (Alternate)
3) _____ (Alternate)

b. The Trustee(s) (of the Funds) for Minor Children will take care of any trust or money left for the child:
1) _____
2) _____ (Alternate)
3) _____ (Alternate)

5. **In your own words, state your personal wishes you have for your minor children's funds (vehicles, college, special medical needs, age to receive, etc). If you are uncertain, the attorney will present ideas:**

6. **HUSBAND: Who shall receive your property under the Will?**

All property to: _____

If not surviving, then to _____

7. **WIFE: Who shall receive your property under the Will?**

All property to: _____

If not surviving, then to _____

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Appointment:

11-

5/24/2011

8. SPECIAL GIFTS: Describe in detail any gifts of specific items.

To Whom	Address	Relationship	Item or Amount
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9. ASSETS: You should review the ownership of your assets to determine the current status of ownership and your preference for whether the title is held **jointly or individually**. The attorney will discuss the effect of each of these on your estate. Please bring copies of any items you wish for attorney to review. The following list is an example of assets that you may have for which you should consider whether each is owned jointly or individually.

- a) Real Estate (bring Deeds to attorney meeting)
- b) Automobiles (bring car titles to attorney meeting)
- c) Stocks
- d) Bonds
- e) Bank Accounts
- f) CD's
- g) Savings Accounts
- h) Value in other Estates or Trusts
- i) 401K
- j) IRA
- k) Collections or Antiques
- l) Other items to bring to attorneys attention:

10. MISCELLANEOUS: The following circumstances may affect your estate. If any of these items apply to you, please circle so that you can ask the attorney to review your circumstances.

- a. **LIFE INSURANCE:** Life Insurance policy beneficiary designations should be reviewed as part of your estate plan. Please confirm that those beneficiaries meet your desires. Additionally, these may need to be changed if trusts are created for minor children. Please advise attorney if you wish for them to discuss this with you.
- b. **GIFTS:** Have you ever filed a Gift Tax Return? Do you ever make a gift of greater than \$12,000 to any one individual in any one year?
- c. **TRUSTS:** Have you ever created a Trust? Supply copies if so.
- d. Do you have a power of appointment in any Trust?
- e. **TAX PLANNING:** Do you expect a substantial inheritance? If so, we may wish to plan a meeting with an estate tax planning specialist.

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- f. **PENSION OR EMPLOYEE BENEFITS:** Do you have any pension or employee benefits for which you or spouse may be eligible.
- g. **BUSINESS ASSETS:** Are you a member of a partnership or self-employed? Do you or spouse own stock in a closely-held corporation?
- h. **MARITAL OBLIGATIONS:** Do either of you have any continuing obligations under a divorce decree. If so, please bring copy of the Property Settlement Agreement or Court Order. Do you have Pre-nuptial or Post-nuptial Agreements? If so, please bring copies of that agreement.
- i. **COMMUNITY PROPERTY:** Have you or spouse ever resided, during time of marriage, outside of KY? If so, when & Where?
- j. **CITIZENSHIP:** Are you both US Citizens? _____
- k. **DOMICILE:** Do you spend a nominal amount of time each year in any other state? If so, where? _____
- l. **INTENTIONAL OMISSION:** Are there other known children that you will intentionally omit from your Will? Yes No

11. OTHER INFORMATION. Please use this space to provide any other information, questions, special wishes or desires for your Estate that we need to discuss.

12. Do you have a Power of Attorney?

- Yes, I already have one. I do not need advice in this area.
- Yes, I already have one but I'd like an Attorney to review it at this time.
- No, please prepare one for me.
- I select the following persons to be my Attorney(s)-in-Fact: _____
Alternate: _____
- No, I need to discuss this with the Attorney.

13. Do you have a Living Will or Health Care Power of Attorney?

- Yes, I already have one. I need do not need advice in this area.
- Yes, I already have one but I'd like an Attorney to review it at this time.
- No, please prepare one for me.
- I select the following persons to be my Attorney(s)-in-Fact: _____
Alternate: _____
- No, I need to discuss this with the Attorney.

** Please bring a copy of any existing Power of Attorney that you would like for the attorney to review as part of your estate plan.