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ESTATE PLANNING QUESTIONNAIRE

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Date:_____

CLIENT INFORMATION

Name:_____ DOB:_____
Occupation:_____ SSN:_____
Cell Phone:_____
email:_____

Name:_____ DOB:_____
Occupation:_____ SSN:_____
Cell Phone:_____ Date of Marriage:_____
email:_____

Address:_____
Home Phone:_____ County of Residence:_____

CHILDREN – Living & Deceased

Name: _____
Address: _____
_____
Phone #s: _____
Age:_____ DOB:_____

Name: _____
Address: _____
_____
Phone #s: _____
Age:_____ DOB:_____

Name: _____
Address: _____
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Age:_____ DOB:_____

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Address: _____
_____
Phone #s: _____
Age:_____ DOB:_____

ASSETS & DEBTS – Fair Market Value, Debts & How Titled

What should I bring to my estate planning meeting?

You should bring complete asset and debt information. This will help you and your attorney make the best possible decisions and tailor an estate planning plan that is right for you. This includes the following:

1. Real Estate - *bring abstracts & deeds & contracts for deed*
2. Stocks/Bonds/Mutual Funds - *bring statements that include titling, value & agent/contact information*
3. Retirement - Pensions, 401K, IRA, etc. - *bring statements that include titling, value & agent/contact info*
4. Life Insurance - *bring statements that include policy owner, insured, value & agent/contact info*
5. Machinery & Equipment - *bring list with approx. value*
6. Small Business Interests/Entities - *bring corporate record book(s)*
7. Cash/Checking/Savings/CDs - *bring statements that include balance & contact information*
8. FinPak or Annual Financial Statements given to lender
9. Vehicles - *bring list with model/year/approx. value*
10. Boats/Motorcycle/Camper/Jet Ski/ Snowmobile/etc. - *bring list with model/year/approx. value*
11. Grain - *number of bushels on hand and where stored*
12. Co-op Equities - *names of Coops and locations with account/membership numbers*
13. Value Added Shares - *bring share certificates*
14. Accounts Receivable/Mortgages/Promissory Notes - *bring copies/current balances*
15. Collectibles/Antiques
16. Unsecured Debt
17. Other

Please use the attached sheets to chart your assets and liabilities.

Asset	Fair Market Value	(Liability)	Net Value: Husband	Net Value: Wife	Net Value: Joint	Net Value: Tenants in Common

Asset	Fair Market Value	(Liability)	Net Value: Husband	Net Value: Wife	Net Value: Joint	Net Value: Tenants in Common

Asset	Fair Market Value	(Liability)	Net Value: Husband	Net Value: Wife	Net Value: Joint	Net Value: Tenants in Common