

# **Couple's Estate Planning Questionnaire**

*Privileged and Confidential*

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## Section I. *Children of this Marriage*

See individual packets for children of prior marriages.

Name (Print Full Name)

Date of Birth

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## Section II. *Gross Taxable Estate for Both Spouses*

Be prepared to discuss whether these are community property v. separate property.

### Testamentary Assets

	Value	Debt/Liability
Bank Accounts	_____	
House	_____	_____
Real Property	_____	_____
Business Interests	_____	_____
Stocks	_____	
Bonds	_____	
Notes	_____	_____
Furniture/Personal Effects	_____	_____
Automobiles	_____	_____
	_____	_____

	_____	_____
Jewelry	_____	_____
Other	_____	_____
Total	_____	_____

Do you own property in another state? \_\_\_\_\_

If yes, where is it located? \_\_\_\_\_

\_\_\_\_\_

Do you have a pet? \_\_\_\_\_

### **Non-Testamentary Assets**

	Value	Debt/Liability
Life Insurance	_____	
Pension Benefits	_____	
Profit-Sharing Plan	_____	
Annuities	_____	
Jointly owned Property (with rights of survivorship)	_____	_____
Trust Assets	_____	
Powers of Appointment	_____	

Other		
TOTAL		

**Section III. *Debt***

(other than as listed above under liability)

Type		Amount
	\$	
	\$	
	\$	
	\$	
	\$	

**Section IV. *List of Documents to Bring to the Meeting***

- \_\_\_\_\_ Estate Planning Documents: wills, trusts, powers of attorney, health care powers, directive to physicians, designation of guardians, homestead designations.
- \_\_\_\_\_ Pre/Post-Nuptial Agreements
- \_\_\_\_\_ Partnership Agreements
- \_\_\_\_\_ Life Insurance/Disability Policies
- \_\_\_\_\_ Deeds to Real Estate