

# **Wife's Estate Planning Questionnaire**

*Privileged and Confidential*

**Oliai Law Firm, PLLC  
Estate Planning  
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## Section I. *Contact Information*

Name: \_\_\_\_\_  
Full Name

Home Address: \_\_\_\_\_

County of Residence: \_\_\_\_\_ Preferred Email: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Date Established Residence in Texas: \_\_\_\_\_ US Citizen? \_\_\_\_\_

Employer: \_\_\_\_\_ Business Phone: \_\_\_\_\_

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

Marital Status: \_\_\_\_\_ Year Married: \_\_\_\_\_

Do you have a Will? \_\_\_\_\_ *(if so, please attach a copy)*

Are you the trustee or beneficiary of any trusts? \_\_\_\_\_

\_\_\_\_\_

## Section II. *Prior Marriages*

If you have not been previously married, please skip ahead to Section III.

To whom: \_\_\_\_\_ Date Terminated: \_\_\_\_\_

Residence when terminated: \_\_\_\_\_  
City, State

*Children by a prior marriage (see couples packet for children of current marriage):*

Name (print full name) Birth Date

\_\_\_\_\_

\_\_\_\_\_

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Have you adopted your husband's children by prior marriages? \_\_\_\_\_

### **Section III. *Fiduciaries***

#### **Last Will and Testament**

**Executor:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone Numbers:** Cell \_\_\_\_\_ Home \_\_\_\_\_

**Second Choice Executor:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone Numbers:** Cell \_\_\_\_\_ Home \_\_\_\_\_

**Third Choice Executor:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone Numbers:** Cell \_\_\_\_\_ Home \_\_\_\_\_

**Trustee:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Second Choice Trustee:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Third Choice Trustee:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Guardian of Minor Children:** \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Second Choice Guardian: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Third Choice Guardian: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

### **Statutory Durable Power of Attorney**

Gives the named person broad power and authority to deal with your property.

First Choice: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Second Choice: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Third Choice: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

### **Medical Power of Attorney and Directive to Physicians**

Person named has the authority to make health care decisions for you if you are incapacitated and unable to make the decisions for yourself.

First Choice: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Second Choice: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Third Choice: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

### **Declaration of Guardian**

Gives the named person authority to manage your assets and be in charge of your personal well-being should you ever need a court appointed guardian.

First Choice: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Second Choice: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Third Choice: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

### **Section IV. *Prior Taxable Transfers***

List all gifts made by you during your lifetime in excess of annual gift tax exclusion.

*(See following page)*

Party to whom gift was made

Date

Value at time of transfer

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## **Section V. *Disposition of Property***

### **Specific Bequests**

Special gifts you desire to make in your will:

Name of Person

Relationship

Property to be Given

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### **Residuary Estate**

Who do you want to inherit the remaining balance of your estate in each of the following situations:

- (a) If your spouse and children survive you.
- (b) If your children survive you, but your spouse does not survive you.
- (c) If neither your spouse nor children survive you.
- (d) If your spouse survives you, but children do not.

(e) Favorite charity

Remarks: Use the back of sheet of paper if necessary. We will be discussing the above ideas at our meeting, please be ready to discuss how your assets should pass in each of the above situations.