

**CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE**  
LAW OFFICE OF DAVID W. FOLEY

NAME:		AGE:
ADDRESS:		
CITY, STATE & ZIP:		
PHONE: (     )		CELL: (     )
EMAIL:		
SINGLE?	MARRIED?	DIVORCED? (HOW LONG?)
		WIDOWED? (HOW LONG?)
SPOUSE NAME:		AGE:
LENGTH OF THIS MARRIAGE:	LENGTH OF PRIOR MARRIAGES:	
HAVE A TRUST NOW? TRUST NAME & DATE:		
ARE YOU A CITIZEN OF THE USA?		IS YOUR SPOUSE?
YEAR YOU BECAME A CALIFORNIA RESIDENT:		
OCCUPATION:		RETIRED?
SPOUSE OCCUPATION:		RETIRED?
NAMES OF ALL OF YOUR CHILDREN OF THIS MARRIAGE (EVEN THOUGH THEY MAY NOT INHERIT):		
NAMES OF ALL CHILDREN FROM PRIOR MARRIAGES (EVEN THOUGH THEY MAY NOT INHERIT): ALSO INDICATE WHICH SPOUSE IS THE PARENT		
WHO WILL BE GUARDIAN OF YOUR MINOR CHILDREN:		
NAME(S) OF DECEASED CHILDREN:		AGE AT DEATH:
# OF GRANDCHILDREN BY DECEASED CHILDREN:	# OF DISABLED CHILDREN:	
# OF DISABLED BENEFICIARIES RECEIVING SSI OR OTHER BENEFITS:		
NAME(S) OF ALL CHILDREN ADOPTED BY YOU ___ OR FROM YOU ___:		
NAME(S) OF YOUR STEP\FOSTER CHILDREN:		
WHO WILL INHERIT FROM YOU: CHILDREN ONLY? Yes___ No___ ALL EQUALLY? Yes___ NO___		

NAMES OF OTHER PERSONS NOT LISTED ABOVE TO INHERIT FROM YOU:

NAME(S) OF SUCCESSOR TRUSTEE(S) :

**ASSETS**

REAL ESTATE Include primary residence, rental property, vacant land, etc.

ADDRESS

APPROX. VALUE

AMT. OWED

DO YOU OWN A BUSINESS? (NAME) :

WHAT TYPE:

SOLE PROPRIETORSHIP?

LLC?

LLP?

CORPORATION?

APROXIMATE VALUE:

**LIST APPROXIMATE BALANCES OR TOTAL VALUE FOR THE FOLLOWING ASSETS:**

CHECKING ACCTS:\$

SAVINGS ACCTS:\$

STOCKS & MUTUAL FUNDS:\$

BONDS:\$

CD'S & MONEY MARKET FUNDS:\$

IRAs:\$

RETIREMENT PLANS:\$

ANNUITIES:\$

DEBTS (INCLUDING NOTES) OWED TO YOU:\$

PARTNERSHIPS (INCLUDING REAL ESTATE):\$

LIFE INSURANCE POLICIES (TOTAL FACE VALUE):\$

MOBILE HOMES, RV'S, BOATS:\$

COLLECTIONS (COINS, GUNS, ART, ETC.):\$

ALL OTHER PERSONAL PROPERTY, DEPOSITS, INVESTMENTS, & ASSETS NOT LISTED ABOVE: \$

NAMES OF ALL JOINT OWNERS OF ANY PROPERTY/ASSET OTHER THAN SPOUSE:

**APPROXIMATE TOTAL VALUE OF ESTATE:\$**

HOW DID YOU FIND US? REFERRAL        WEBSITE        PRINT AD        OTHER?

IF REFERRED, BY WHOM?