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

Pei	rso	nal	l Ir	ιfc

First Name:	<u> </u>		M.I.	Last Name:				D.O.B.	Age
Address:						City/State/Zip:			
Address.						City/State/Zip.			
Phone: ( )		Cell: ( )	)		Email:				
Occupation:							Retired	I? Y N	
Current Status:	Married?	How lon	g?	Pre-nup?	Sir	ngle? Divor	ced?	Widowed?	
First Name:			M.I.	Last Name:				D.O.B.	Age
Address (if differ	ent from above):		I			City/State/Zip:		1	
Phone: ( )		Cell: (	)		Email:				
Occupation:					1		Retire	d? Y N	
Have a trust now	? YN	Nam	ne/Date	of Current Trust	t:				
	eficiaries/Trust								
Names of childre	n of this marriage	(can use m	iddle in	itials - state ages	if minors)	:			
Names of other of	children (can use m	niddle initia	ıls - stat	e ages if minors)	/Name of	parent:			
Name of any doc							Δ.		
Name of any dec	eased child's child	ren and age					A§	ge:	
Name of any disa							A	ge:	
•	dian of your minor	children (i	if both	parents are dece	ased)?:			50.	
1. (primary):				2.	(backup):				
Who will inharit	from you? Childre	n anlu2 V	N	Others? \	/ NI	All will inheri	t agually2	V N	
	rit from you (benef		IN_	Others?	/ N	Relationsh			er?
								33283	
State additional i	nformation from t	his page he	ere (you	ı may attach add	itional pag	es if necessary):			,
,									
'									<u>i</u>
Successor Trustees (become trustee after you – i.e. at your death)									
1. (primary):	,	,,,,,			(backup):				

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

<b>ACCET</b>	c
<b>HOOLI</b>	3

Address Worth 5 Owes \$ Joint Owner?    Own a Business? Y N N Name:   Value (aprox)?	Real Estate (Include Residence, Condos, Rer		Mobile Homes)				
Own a Business? Y N Name: Value (aprox)?  What type?   Soile Proprietorship?   LLC?   LLP?   Corporation?  Other Assets (aprox value):   Bank Accounts \$   CDs S	Address				Owes \$	Joint Owner?	
What type?    Sole Proprietorship?						!	
What type?    Sole Proprietorship?						; 	
What type?    Sole Proprietorship?				 			
What type?    Sole Proprietorship?							
What type?    Sole Proprietorship?							
What type?    Sole Proprietorship?					<del>i</del>	i	
What type?    Sole Proprietorship?							
What type?    Sole Proprietorship?				/	12		
Sole Proprietorship?   LLC?   LLP?   Corporation?				value (apro	)X)?		
Other Assets (aprox value):  Bank Accounts \$ Savings Accounts \$ CDs \$  Money Market Funds \$ Stocks \$ Bonds \$  Mutual Funds \$ Retirement Plans \$ IRAs \$  Annuities \$ Life Insurance \$ Other \$  ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Worth\$  Personal Property  Cars \$ R.V.s \$ Boats \$  Antiques \$ Art \$ Jewelry \$  Collections \$ Musical Instruments \$  All Other Valuable Items (list):  Worth \$  Aprox. Total Value of Estate \$:  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?					<u> </u>		
Bank Accounts \$   Savings Accounts \$   CDs \$	Sole Proprietorship?	LLC?	LLP?		Corporation?		
Bank Accounts \$   Savings Accounts \$   CDs \$	Other Assets (aprox value):						
Money Market Funds \$   Stocks \$   Bonds \$		Savings Accounts \$		CDs \$			
Mutual Funds \$ Retirement Plans \$ IRAs \$ Annuities \$ Life Insurance \$ Other \$  ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Personal Property  Cars \$ R.V.s \$ Boats \$ Antiques \$ Art \$ Jewelry \$ Collections \$ Musical Instruments \$  All Other Valuable Items (list):  Worth \$  Aprox. Total Value of Estate \$:  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?	Money Market Funds \$						
Annuities \$ Life Insurance \$ Other \$  ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Personal Property  Cars \$ R.V.s \$ Boats \$ Antiques \$ Art \$ Jewelry \$  Collections \$ Musical Instruments \$  All Other Valuable Items (list):  Worth \$  Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?				·			
ALL other property and assets NOT included above (Oil, Mineral, Gas Rights; Time Shares; Money Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Personal Property  Cars \$ R.V.s \$ Boats \$ Ant \$ Jeweiry \$ Collections \$ Musical Instruments \$  All Other Valuable Items (list):  Worth \$  Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?	· ·						
Owed to You; LLC, LLP, Partnerships; Joint Tenancies; Pension; etc):  Personal Property  Cars \$ R.V.s \$ Boats \$ Ant \$ Jewelry \$ Collections \$ Musical Instruments \$  All Other Valuable Items (list):  Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?	Aimuities 9	Life ilisurance 5		Other 9			
Personal Property    Cars \$   R.V.s \$   Boats \$     Antiques \$   Art \$   Jewelry \$     Collections \$   Musical Instruments \$     All Other Valuable Items (list):   Worth \$     Aprox. Total Value of Estate \$:    Additional information you wish to include (you may attach pages if necessary):	ALL other property and assets NOT include	ed above (Oil, Mineral, Gas Rig	ghts; Time Shar	es; Money			
Cars \$   R.V.s \$   Boats \$   Antiques \$   Art \$   Jewelry \$   Collections \$   Musical Instruments \$    All Other Valuable Items (list):   Worth \$    Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):    HOW DID YOU FIND US? REFERRAL   WEBSITE   YELP   PRINT AD   OTHER?	Owed to You; LLC, LLP, Partnerships; Joint	Tenancies; Pension; etc):			Worth\$		
Cars \$ R.V.s \$ Boats \$ Antiques \$ Art \$ Jewelry \$  Collections \$ Musical Instruments \$  All Other Valuable Items (list): Worth \$  Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?							
Cars \$ R.V.s \$ Boats \$ Antiques \$ Art \$ Jewelry \$  Collections \$ Musical Instruments \$  All Other Valuable Items (list): Worth \$  Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?							
Cars \$   R.V.s \$   Boats \$   Antiques \$   Art \$   Jewelry \$   Collections \$   Musical Instruments \$    All Other Valuable Items (list):   Worth \$    Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):    HOW DID YOU FIND US? REFERRAL   WEBSITE   YELP   PRINT AD   OTHER?							
Cars \$ R.V.s \$ Boats \$ Antiques \$ Art \$ Jewelry \$  Collections \$ Musical Instruments \$  All Other Valuable Items (list): Worth \$  Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?	<u> </u>						
Antiques \$ Art \$ Jewelry \$  Collections \$ Musical Instruments \$  All Other Valuable Items (list): Worth \$  Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?	Personal Property						
All Other Valuable Items (list):   Worth \$	Cars \$	R.V.s \$					
All Other Valuable Items (list):    Worth \$				Jewelry \$			
Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?	Collections \$	Musical Instruments \$					
Aprox. Total Value of Estate \$:  Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?	All Other Valuable Items (list):				Worth \$		
Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?	7 iii Gener Varadasie reems (nac).				Worth \$	Worth	
Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?							
Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?							
Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?							
Additional information you wish to include (you may attach pages if necessary):  HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?							
HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?	Aprox. Total Value of Estate \$:						
HOW DID YOU FIND US? REFERRAL WEBSITE YELP PRINT AD OTHER?	Additional information was wish to include	/ :f :f :f					
	Additional information you wish to include	(you may attach pages if neces	ssary):			!	
		,					
	HOW DID YOU FIND HES DEFENDAL	WEDCITE VELD DE	OINT AD	OTUED3			
		WEDSHE YELY PH	MINI AD	OTHER!			