

Date:

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

LAW OFFICE OF DAVID W. FOLEY

Personal Info

First Name:	M.I.	Last Name:	D.O.B.	Age
Address:			City/State/Zip:	
Phone: ()	Cell: ()	Email:		
Occupation:			Retired? Y ___ N ___	
Current Status:	Married? ___	How long? ___	Pre-nup? ___	Single? ___
	Divorced? ___	Widowed? ___		

First Name:	M.I.	Last Name:	D.O.B.	Age
Address (if different from above):			City/State/Zip:	
Phone: ()	Cell: ()	Email:		
Occupation:			Retired? Y ___ N ___	

Have a trust now? Y ___ N ___	Name/Date of Current Trust:
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Children/Beneficiaries/Trustees

Names of children of this marriage (can use middle initials - state ages if minors):

Names of other children (can use middle initials - state ages if minors)/Name of parent:

Name of any deceased child: _____	Age: _____
Name of any deceased child's children and ages: _____	

Name of any disabled child: _____	Age: _____
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Who will be guardian of your minor children (if both parents are deceased)?:	
1. (primary):	2. (backup):

Who will inherit from you? Children only? Y ___ N ___ Others? Y ___ N ___ All will inherit equally? Y ___ N ___		
Others to inherit from you (beneficiaries):	Relationship to you?	Caregiver?

State additional information from this page here (you may attach additional pages if necessary):

Successor Trustees (become trustee after you – i.e. at your death)	
1. (primary):	2. (backup):

Date: _____

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ASSETS

Real Estate (Include Residence, Condos, Rentals, Land, Vacation Homes, Mobile Homes)			
Address	Worth \$	Owes \$	Joint Owner?

Own a Business? Y _____ N _____ Name: _____	Value (aprox)? _____		
What type?			
Sole Proprietorship?	LLC?	LLP?	Corporation?

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 \$: _____

Additional information you wish to include (you may attach pages if necessary):

HOW DID YOU FIND US? REFERRAL _____ WEBSITE _____ YELP _____ PRINT AD _____ OTHER? _____
If Referred, by whom? _____