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The following information will be helpful to me (and to you) in discussing your estate plan and preparing your wills. This information is confidential and will not be revealed to anyone without your permission. The financial information requested can be estimated; I do not need exact values for planning purposes. If any of the information requested is not applicable to your situation, please mark it “not applicable” or “N/A.” If you have difficulty in answering any of the questions, I will help you when we meet together.

ESTATE PLANNING QUESTIONNAIRE- COUPLES

Today’s Date: _____

I. FAMILY AND PERSONAL FACTS

Husband’s Name (as you wish it to appear in your will): _____

Wife’s Name (as you wish it to appear in your will): _____

Husband’s Soc. Sec. No.: _____ Husband’s Birthdate: _____

Wife’s Soc. Sec. No.: _____ Wife’s Birthdate: _____

Residence Address: _____

Home Telephone No.: _____

Husband’s Business Address: _____

Husband’s Business Telephone No.: _____ Husband’s Cell No.: _____

Wife’s Business Address: _____

Wife’s Business Telephone No.: _____ Wife’s Cell No.: _____

Primary Email Address: _____

Secondary Email Address: _____

Are both spouses citizens of the United States? Yes No

If no, please give spouse’s name and country of citizenship: _____

Date of Marriage: _____

Date residence established in Wisconsin: Husband: _____ Wife: _____

Do you have a marital or pre-marital agreement? Yes No (If yes, please attach a copy.)

Children	Sex	Date of Birth	Age	Dependent?	Adopted?	Married	City of Residence

Have either of you been married before? Yes No

If so, are there outstanding obligations¹ that affect your estate planning? Yes No

If so, please explain: _____

Do either of you have children by a former marriage? Yes No

If so, please give names, ages, dates of birth, marital status and place of residence on separate sheet.

Grandchildren	Sex	Age	Child Of	Grandchildren	Sex	Age	Child Of

¹ Examples would be child support, alimony, a requirement to maintain health or life insurance for the benefit of others, etc.

PARENTS	NAME	LIVING	AGE	RESIDENCE
Husband's Father				
Husband's Mother				
Wife's Father				
Wife's Mother				

HUSBAND'S BROTHERS AND SISTERS	AGE	RESIDENCE

WIFE'S BROTHERS AND SISTERS	AGE	RESIDENCE

Do you, your spouse, or your children have any unusual health problems likely to affect your estate planning? Yes No

If so, please explain: _____

II. INVENTORY OF YOUR ESTATE PLAN

Jointly Held Property

Describe below any assets that are titled in both names:

Description of Assets	Approximate Value

Do you foresee any radical fluctuation in your total net worth in the next five years?

Yes No

If so, please explain: _____

III. CURRENT DISPOSITIVE INSTRUMENTS

Does husband currently have a will? Yes No Date: _____

Does wife currently have a will? Yes No Date: _____

Other than any trusts in your wills, have you or your spouse created any trusts? Yes No

If so, please describe: _____

IV. DESIRED DISTRIBUTION

The following questions can be discussed in our conference, but it is helpful to consider them beforehand.

Do you want to leave any specific items to specific persons? Yes No

If yes, please describe: _____

If you have children, and if something should happen to both spouses, would you want to have a trust established for your children? If a child is under age 21 and if no trust is established, property goes to a guardian or custodian for that child, to be distributed at age 21. A trust can last beyond age 21. If a trust is established, it is flexible, in that money is available for the health, education, and support of the child during the trust. If you would like such a trust, please consider the following questions:

Would you want each child to receive his or her share upon attaining a certain age (e.g., 25, 30, etc.), or would you want distribution to wait until the youngest child reaches a certain age? _____

At what age would you like the child to receive his or her share (at what age of the youngest child, if that is the option chosen)? _____

Would you want a multi-stage distribution of a child's share (e.g., 1/2 at age 25, 1/2 at 30)?

Yes No

If yes, how would you like it set up? _____

Would you want each child's college expenses to come out of his or her separate share, or to come out of the common fund before it is divided into separate shares? _____

Would you want the trustee to have discretion to make advancements of a child's ultimate share for a worthwhile purpose such as buying a home or starting a business? Yes No

If a child should die during the trust, leaving a spouse and/or children (your grandchildren), should the child's share of the trust go:

To the grandchildren? Yes No

To the spouse? Yes No

To both? Yes No

To others? Yes No

If you have minor children, I recommend nominating a guardian for the children if both parents should die while the children are still minors. Whom would you wish to nominate?

Name: _____

Residence: _____

Second choice name: _____

Second choice residence: _____

The “personal representative” (executor) of your estate is responsible for collecting the assets of your estate, paying the debts, expenses and taxes, and distributing the assets according to your will. This can be either an individual (e.g., your spouse) or a trust company. Who is your first choice to serve as personal representative?

First Choice: _____

Second Choice: _____

If you create a revocable trust, or one or more trusts in your will, it is necessary to name a trustee to administer the trusts. The trustee can be an individual or a bank with a trust department (which not all banks have). Who is your first choice to serve as trustee? _____

Second choice (if you name an individual as first choice)? _____

If you name a bank as trustee, is there an individual you would wish to name as advisor to the trustee on matters of distribution? _____

If you own a business, do you desire a particular distribution of its stock or its assets?
