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ATTORNEYS AT LAW**

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ESTATE PLANNING QUESTIONNAIRE

DATE PREPARED: _____

I. Family Data

A. Name in full: _____

B. Date of Birth: _____

C. Maiden name, if applicable: _____

D. Spouse's name: _____

Maiden name, if applicable: _____ Date of birth: _____

E. Social Security Numbers: Yours: _____ Spouse: _____

F. Principal residence: _____

G. Telephone number: _____

H. Citizenship: Yours: _____ Spouse: _____

I. Family and Intended Beneficiaries:

NAME: _____

RELATIONSHIP: _____

DATE OF BIRTH: _____

ADDRESS: _____

PHONE: _____

SSN: _____

NAME: _____

RELATIONSHIP: _____

DATE OF BIRTH: _____

ADDRESS: _____

PHONE: _____

SSN: _____

NAME: _____

RELATIONSHIP: _____

DATE OF BIRTH: _____

ADDRESS: _____

PHONE: _____

SSN: _____

NAME: _____

RELATIONSHIP: _____

DATE OF BIRTH: _____

ADDRESS: _____

PHONE: _____

SSN: _____

II. Will preparation information

A. Describe generally to whom you want your property to pass to upon your _____

B. Name and address of a person trusted by you to be Personal Representative of your estate. Name an alternate if desired. Your Personal Representative can be male or female, and it is preferable it be a Washington resident and usually a member of your family or a best friend.

C. Do you want a Community Property Agreement drawn? _____

D. Do you have any special instructions for funeral arrangements? _____

E. Give the name, address, and relationship of a person trusted by you to be the guardian of the person of your children, if needed, upon the death of you and your spouse.

- F. Give the name, address, and relationship of a person trusted by you to be guardian of the estate of your children, if needed upon the death of you and your spouse.

III. Powers of Attorney

- A. Do you want a Power of Attorney for Health Care Decision Making? If so, give the name and relationship of the person you would like to designate as your primary attorney-in-fact and alternate attorney-in-fact. _____

- B. Do you want a Power of Attorney for Asset Management? If so, give the name and relationship of the person you would like to designate as your primary attorney-in-fact and alternate attorney-in-fact. _____

IV. Preparatory steps

An estate planning conference appointment will be set for you. Please bring this completed questionnaire and the following documents:

- A. Copies of all Wills and/or Trusts
- B. Copy of Community Property Agreement and/or Joint Tenancy Agreement
- C. Copies of any Gift Tax Returns
- D. Rough inventory of all assets
- E. Statement describing known retirement plans, including amount vested, estimated benefits, and method of distribution (whether lump sum or periodic payment)