

TLD LAW: ESSENTIAL ESTATE PLANNING QUESTIONNAIRE

1. Your legal name: _____
 US Citizen: Yes No
 Cell Phone #: _____

2. Spouse's legal name: _____
 US Citizen: Yes No
 Cell Phone #: _____

3. Home address: _____

 City/State/Zip _____

4. For children, if any, please provide the following:	Birthdate	This Marriage	Client's child	Spouse's child
Name:				
Address:				
Cell phone:				
Name:				
Address:				
Cell phone:				
Name:				
Address:				
Cell phone:				
Name:				
Address:				
Cell:				
Name:				
Address:				
Cell phone:				

Please indicate if any child has special needs or if any children have predeceased you:

(Use back side if additional space is needed)

5. GUARDIANSHIP OF MINOR CHILDREN. If you have children under the age of 18, please name who should have custody of your children in the event something happens to you.

a. **First choice** for guardian:

Name: _____
Relationship: _____
Address: _____
Cell Phone: _____

b. **Alternate choice** for guardian:

Name: _____
Relationship: _____
Address: _____
Cell Phone: _____

6. EXECUTOR/SUCCESSOR TRUSTEES. Every will needs someone to act as an executor. Likewise, every trust needs a successor trustee. The executor and successor trustees are often the same individuals.

They are responsible for collecting all the property at the time of death and paying all legal debts, taxes, and expenses. They are also responsible for distributing the property to your designated beneficiaries.

You can select anyone over 18 years or an institution. It is advisable to name an alternate executor/successor trustee in case the first person is not able to serve. We will review the differences between a will and trust when we meet.

a. **First choice** for executor/successor trustee:

Name: _____
Address: _____
Cell Phone: _____

b. **Alternate choice** for executor/successor trustee:

Name: _____
Address: _____
Cell Phone: _____

7. **BENEFICIARIES.** As part of this process, a revocable/living trust will be set up for you. This trust is designed to avoid probate once properly funded. The trust can be changed any time during your lifetime so long as you have capacity.

When you pass away, the successor trustee of the trust will distribute your assets to those you intend according to the terms of the trust.

Please indicate if you want your trust to be divided into equal shares, percentages or dollar amounts and to whom. Please also indicate if you want specific assets to be distributed to specific persons. This will help us discuss how your trust should be drafted when we meet.

Thus, please use the space below to indicate your desired beneficiaries:

8. As part of your estate plan, we will prepare a **DURABLE POWER OF ATTORNEY** that will allow someone to make financial decisions for you in the event you are declared incapacitated.

a. Who should manage your financial affairs in the event you are unable to do so?

Name: _____
Address: _____
Cell Phone: _____

b. Who should be an alternate?

Name: _____
Address: _____
Cell Phone: _____

9. We will also prepare an **ADVANCE HEALTH CARE DIRECTIVE** that will allow someone to make medical decisions in the event you are not able to make your own decisions.

Please check here if your health care agents will be same as listed above for your durable power of attorney.

a. Who should make medical decisions in the event you are unable to do so?

Name: _____
Address: _____
Cell Phone: _____

b. Who should be an alternate?

Name: _____
Address: _____
Cell Phone: _____

10. **ESTATE TAX PLANNING.** To determine if estate tax planning is required, it is important to estimate the value of your accumulated property. This includes retirement, life insurance and all property you own. The current exemption for federal estate tax is \$11.7m for 2021 deaths. **Estimated value of your assets:**

- a. [] Under \$5.0 million
- b. [] Between \$5.0 million to \$11 million
- c. [] Between \$11 million to \$22 million or [] greater

11. YOUR ASSETS.

As part of estate planning, it is important to assess and identify all of your assets to ensure that there are not other issues that need to be addressed such as community property issues and estate tax planning. **If you need more room, please list at the end or use the back side.**

REAL PROPERTY: (e.g., primary residence, land, rentals, vacation home)

ADDRESS: _____

Character: Community Property Separate Property

ADDRESS: _____

Character: Community Property Separate Property

FINANCIAL ACCOUNTS (Indicate name of bank or financial institution, account type and any other identifying information. Please list all checking, savings, brokerage, CDs, stocks, mutual funds, life insurance policies, annuities and retirement accounts.):

Name & Type: _____
Account # _____

Name & Type: _____
Account #: _____

Name & Type: _____
Account #: _____

Name & Type: _____
Account # _____

Name & Type: _____
Account #: _____

Name & Type: _____
Account #: _____

Name & Type: _____
Account #: _____

BUSINESS INTERESTS and OTHER ASSETS:

- S/C Corporations: _____
- Partnerships: _____
- LLCs: _____
- Sole Proprietorships: _____
- Powers of Appointment: _____
- Expected inheritances: _____
- Promissory notes: _____
- Copyrights/patents: _____
- Oil/Mineral rights: _____

Please jot down any thoughts and questions for our meeting or use this space to provide additional information for assets:
