

HOLBROOK PETERSON & SMITH, PLLC

C O U N S E L O R S A T L A W

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ESTATE PLANNING QUESTIONNAIRE

Date: _____

	Client 1	Client 2
Name:		
Date of Birth:		
U.S. Citizen?	Yes _____ No _____	Yes _____ No _____
Employer:		
Cell Phone: Work Phone:		
Social Security #:		

Home Address: _____ Phone: _____
Email: _____*

** If you give us your email address, you are granting permission to send confidential information by electronic mail.*

Date of Marriage: _____ States of Residence Since Marriage: _____

Children (Name, Date of Birth, and City of Residence):
Birth):

Grandchildren (Name and Date of Birth):

Special Family Considerations: (Prior marriages; support obligations beyond immediate family; health problems, etc)

Describe any significant potential inheritances. _____

Have you made lifetime taxable gifts? _____ Have you filed gift tax returns? _____

Are you a trustee or guardian of someone's property or person? _____

Are you a beneficiary of a trust established by someone else? _____

Annual Income: Client 1: _____ Client 2: _____

**ASSET SUMMARY
(Round to Even \$1,000)**

LIFE INSURANCE

Company	Type (Group, Term, Variable, Etc.)	Name of Insured	Name of Owner	Name of Beneficiary	Face Value/ Cash Value	Annual Premium

ASSET SUMMARY
(Round to Even \$1,000)

Assets	Assets in Name of Client 1	Assets in Name of Client 2	Assets in Joint Name
Cash, Checking Accts., Savings Accts.			
Tangible Personal Property (Household effects, furniture, jewelry, etc.)			
Real Property – Residential Location and Value			
Other Real Property			
Stocks and Bonds			
IRA's 401(k), pension			
Business Interests – Describe generally; estimate value			
Total of Above			

LIABILITIES
(Round to Even \$1,000)

	Owed by Client 1	Owed by Client 2	Owed Jointly
Mortgages Owed			
Loans on Life Ins.			
Other			
Total of Above			