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**ESTATE PLANNING QUESTIONNAIRE**

This **Estate Planning Questionnaire** is designed to help you decide your estate plans, and to help us in advising you and drafting the documents you will need to carry out your plans. Please think about each of the items listed below and jot down your answers. When we discuss the details of your estate plans, you can refer to this form to answer our questions. Of course, any information you provide to us will be kept strictly confidential.

**1. Please tell us about yourself.**

Name

Home Address

Is this your permanent address?

If not, what is your permanent address?

Do you have a will now?

If you do, where and when was it signed?

Have you ever been divorced? If so, is your ex-spouse still alive? As part of your divorce, did you promise to pay money or leave anything to your ex-spouse?

**2. Now, please tell us about your spouse.**

**(If you're not married, you can skip to the next part)**

Spouse's Name

Spouse's Home Address

Is this your spouse's permanent address?

If not, what is your spouse's permanent address?

Does your spouse have a will now?

If your spouse does, where and when was it signed?

Has your spouse ever been divorced? If so, is his/her ex-spouse still alive? As part of the divorce, did your spouse promise to pay money or leave anything to her/his ex-spouse?

**3. Please tell us about your children.  
(If you have no children, you can skip to the next part)**

Please list your children (by full name, age, and city of residence) and tell us whether they are children of the current marriage, or of any previous marriage of you or your spouse.

If there are any children you want to disinherit, please list them.

If you are interested in a trust for any of your children, see the Trust section later on this form.

**4. Tell who you want as executor or personal representative.**

About each possible executor or personal representative, tell us the person's name, the person's approximate age, the person's city/state of residence, and the person's relationship to you. [A close relative can be your personal representative even if he/she is not a Florida resident]

**5. If you have minor or disabled children, tell us who you want as their guardians.**

**6. Tell us about the people you want to provide for in your estate plan.**

[For example, you should consider such things as the name of the beneficiaries, the property or share you want to go to the beneficiaries, what you want done with the gift if a beneficiary is a minor at the time of your death, or what you want done with the gift if the person named is dead but may have left children].

**7. If you are interested in a trust for your family, tell us about your plan.**

[For example, what property you want to include in the trust; whether you want the trust to go into effect now or at your death; who you want to be your trustee(s); and when and how you want the trust property distributed].

**8. Tell us a little about your property.**

[We are more concerned here with your estimate of the total size of your estate, including joint property and life insurance; if your estate is very large, special planning may be needed to reduce taxes. Also, if some or all of your property is jointly owned or in trust, the will drafter must know about it if your plan is to leave that property to someone else in your will.]

**9. Tell us if you are interested in a "Durable Family Power of Attorney".**

[A "Durable Family Power of Attorney" gives another person the power to act directly for you and in your stead; it grants the person the full authority to bind you and your property. It is not a power that should be lightly granted. We'll need the name of the person to whom you wish to give the power of attorney and the person's family relationship to you].

**10. Tell us if you are interested in a "Living Will".**

[A "Living Will" is a document which gives your instructions to your doctors when extraordinary measures could be used to artificially prolong the process of dying].

**11. If you have any directions for your funeral, outline them for us.**