

## ESTATE PLANNING QUESTIONNAIRE

Your Name: Date of Birth:	
Your Spouse's Name: Date of Birth:	
Years Married:	
Prior Spouse's Name(s):	
Do you have a pre-marital agreement?	Yes    or    No If yes please provide a copy of the agreement.
Are you a US Citizen?    Yes or No	Is your spouse a US Citizen?    Yes    or    No
Any persons to be involved in your estate plan who are not US Citizens?	
How many children do you have?	
Full legal names of all of your Children:  List each child's address, telephone number and dates of birth (attached pages as needed)	

Do you have any deceased children? If yes, please list each deceased child's name and all of the deceased child's children, if any.	
Do you have any child/beneficiary with Special Needs or who receives government public benefits?	
Do you want to omit any child as a beneficiary of your estate? Who?	
Disposition of your remains:	Burial or Cremation or Undecided
Organ donation	Yes or No

**OTHER ITEMS TO BRING TO YOUR MEETING:**

1. Real Estate. List of all real estate owned. A copy of the Grant Deed(s) for each property, if available. We do not need the Deed of Trust which relates to the Mortgage;
2. Bank Accounts. Copy of a recent monthly statement for each of your bank accounts;
3. Investment Accounts. Copy of a recent monthly or quarterly statement for each investment account(s), including any stocks, bonds, CDs, etc.;
4. Retirement Accounts. Copy of a recent monthly or quarterly statement for each of your retirement accounts, IRAs, 401(k)s, 401(a)s, 403(b), 457 plans, etc.;
5. Life Insurance. Copy of declarations page for each life insurance policy owned or information on the amount of coverage/death benefit for each policy. Copy of the page showing the persons nominated as the primary beneficiary(ies) and contingent or secondary beneficiary(ies), if available, or information as to who is designated as the primary beneficiary(ies) and contingent or secondary beneficiary(ies), if known; and
6. Estate Planning Documents. Copy of any existing Wills, Trusts or Powers of Attorney you may have.

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ALBENCE & ASSOCIATES APC  
ATTORNEYS AT LAW

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