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Fort Myers
12800 University Drive, Ste. 420
Fort Myers, FL 33907
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Reply to: Fort Myers

CONFIDENTIAL PRELIMINARY ESTATE PLANNING QUESTIONNAIRE

YOUR:

Name: _____
Home Address: _____
Phone: _____
Age: _____
Occupation: _____ (Active or Retired?)
Citizenship: _____

YOUR SPOUSE'S:

Name: _____
Home Address: _____
Age: _____
Occupation: _____ (Active or Retired?)
Citizenship: _____

YOUR CHILDREN

Child #1 Name: _____
Home Address: _____
Age: _____
Occupation: _____
Marital Status: Single ____ Married ____ Divorced ____ Separated ____

Child # 2 Name: _____
Home Address: _____
Age: _____
Occupation: _____
Marital Status: Single ____ Married ____ Divorced ____ Separated ____

Child # 3 Name: _____
Home Address: _____
Age: _____
Occupation: _____
Marital Status: Single ____ Married ____ Divorced ____ Separated ____

For additional children, please use a separate sheet of paper.

Do you and/or your spouse have a will, trust, or other estate planning documents in place now? If so, please provide a copy or a brief description of such documents.

Please list all states in which you have lived since your marriage._____.

Have you or your spouse ever been married before your current marriage?

Yes _____ No _____

Do you or your spouse have children from a previous marriage or relationship?

Yes _____ No _____

Do you and/or your spouse have a prenuptial or postnuptial agreement between you?

Yes _____ No _____

Do you and/or your spouse have any grandchildren? If so, how many? _____. If so, what is the age of oldest _____ and age of youngest _____.

How would you characterize your current health?

You: _____ Excellent _____ Good _____ Fair _____ Poor
Spouse: _____ Excellent _____ Good _____ Fair _____ Poor

ASSETS, INCOME, AND LIABILITIES (For purposes of this preliminary questionnaire, all that is needed are approximate values to the best of your knowledge.)

	<u>YOU</u>	<u>SPOUSE</u>	<u>JOINT</u>
Annual Income	\$ _____	\$ _____	\$ <u>XXX</u>
Cash/ Checking/Savings	\$ _____	\$ _____	\$ _____
Stocks/Bonds/Brokerage Accts.	\$ _____	\$ _____	\$ _____
Pensions/IRA/401(k)	\$ _____	\$ _____	\$ <u>XXX</u>
Primary Residence (Homestead)	\$ _____	\$ _____	\$ _____
Other Real Estate	\$ _____	\$ _____	\$ _____
Life Insurance (Death Benefits)	\$ _____	\$ _____	\$ _____

(continued on next page)

Business Interests/Ownership	\$ _____	\$ _____	\$ _____
Expected Inheritance, Gift, or Judgment	\$ _____	\$ _____	\$ _____
Automobiles/Motor Vehicles, Art, Jewelry, Antiques, Collectibles	\$ _____	\$ _____	\$ _____
Miscellaneous/Other	\$ _____	\$ _____	\$ _____
<u>LIABILITIES</u>			
Mortgage on Primary Residence	\$ _____	\$ _____	\$ _____
Mortgage on Other Real Estate	\$ _____	\$ _____	\$ _____
Bank Loans/Business Loans	\$ _____	\$ _____	\$ _____
Other Liabilities	\$ _____	\$ _____	\$ _____

Based upon your current understanding and wishes about your estate, please answer the following questions to the best of your ability. Please know that none of your responses is binding in any way and that we will discuss all of these issues in detail, including possible options and alternatives that you may not be aware are possible at this time.

On a scale of 1-6, with 1 being the most important, and 6 being the least important, please rank these six estate planning goals:

- ___ - Avoid or minimize estate taxes
- ___ - Avoid probate
- ___ - Provide for your spouse
- ___ - Provide for your children
- ___ - Avoid guardianship upon disability
- ___ - Make charitable donations

Please add any other issues or concerns that you wish to raise or discuss:
