

# Thatcher Law, LLC

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## **Estate Planning Questionnaire**

Please fill out this questionnaire as fully as possible. If any question does not apply, write "NA" or "not applicable" or leave the field blank.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone(s): \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Spouse/Partner Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone(s): \_\_\_\_\_

Date of Birth: \_\_\_\_\_

**CHILDREN:** Please list names, dates of birth, addresses, phone numbers and how many children they each have. (If you do not have children but plan to leave assets to specific people, please list their names, dates of birth, addresses, and phone numbers):

**GENERAL QUESTIONS:**

Who do you want to manage your financial affairs if you cannot? (Financial Power of Attorney) List your first choice, relationship, name and city and state; then one or two successors, if any.

Who do you want to be the Executor of your Will? List your first choice, relationship, name and city and state; then one or two successors, if any.

Who do you want to be the Trustee of your Trust after your death? List your first choice, relationship, name and city and state; then successors, if any. (If applicable)

Who will make medical decisions if you cannot? (Living Will, Health Care POA). List your first choice, relationship, name, address and phone number; then one or two successors, if any.

If a need arose, who would you want to be your guardian? Please list your first choice and a successor (if wanted). State name and relationship:

If you have minor children, who do you want to be your child(ren)'s guardian?

List your first choice's relationship, name and the city and state where they live; then one or two successors, if any. Note: This can be two people jointly – such as a couple.

Do you have any child or grandchild receiving disability payments? Yes or No

If “Yes,” explain:

**REAL PROPERTY:**

Do you own any real estate? Yes or No If “Yes,” please list your addresses and the type of real property (i.e, home, vacation, business, rental, vacant lot, farm land, etc.):

**DIVISION OF ESTATE:**

Do you want your estate to go to your spouse/partner in full at your death, or do you want some other arrangement?

If you have children, do you want your estate divided equally among the children, or do you want some other arrangement?

If one of your children should predecease you, do you want his/her share to go to his/her children (your grandchildren) or to your remaining living children?

If you will have a trust, do you want distributions to children and/or grandchildren to go to them immediately upon your death or over time at certain ages?

Any special bequests? Are there specific items or amounts of cash that you want to go to certain individuals or charities? (Please list names, relationships, and if a charity, address or city and state)