

# Beck & Associates, PLLC

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## **List of Things to Bring**

- 1) Last year's IRS Form 1040
- 2) Copy of any current Wills and/or Trusts and/or Marital Agreements (if applicable)
- 3) Personal Financial Statement, (or general list of assets and liabilities included in the estate planning questionnaire)
- 4) Copy of Real Estate Warranty Deeds

PLEASE PROVIDE ME WITH A COPY OF YOUR CURRENT WILL, ANY TRUSTS, AND/OR MARITAL AGREEMENTS, IF YOU HAVE ANY OF THESE DOCUMENTS.

**ESTATE PLANNING QUESTIONNAIRE**

**PERSONAL INFORMATION:**

Husband's Name:

\_\_\_\_\_ (First) (Middle) (Last)

Wife's Name:

\_\_\_\_\_ (First) (Middle) (Last)

Home Address:

\_\_\_\_\_ (Street) (City) (State) (Zip) (County)

Home Telephone:

Cell Number (Husband)

Cell Number (Wife)

e-mail address (Husband) \_\_\_\_\_

**(To be used for confidential information)**

e-mail address (Wife) \_\_\_\_\_

**(To be used for confidential information)**

**Husband's Additional Information:**

Date of Birth:

Citizenship:

Social Security No.:

Business Telephone:

**Wife's Additional Information:**

Date of Birth:

Citizenship:

Social Security No.:

Business Telephone:

If you were referred to me, I would like to thank them: \_\_\_\_\_  
Name & Firm or Company

**Husband's Will:**

**DISPOSITION OF PROPERTY:**

Describe in your own words how you would like your property distributed upon your death.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Wife's Will:**

**DISPOSITION OF PROPERTY:**

Describe in your own words how you would like your property distributed upon your death.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CURRENT MARRIAGE:**

Date of Marriage: \_\_\_\_\_ State of Residence when Married: \_\_\_\_\_

**PRIOR MARRIAGES:**

If either you has been married before, please furnish the following information as to each prior marriage below:

Former marriage of \_\_\_\_\_ (Husband/Wife)  
Name of Former Spouse:

\_\_\_\_\_  
(First) (Middle)(Last)

Date of Marriage: \_\_\_\_\_ Date of termination of Marriage: \_\_\_\_\_

Cause of termination of Marriage: Death Divorce or Annulment (Circle One)

Former marriage of \_\_\_\_\_ (Husband/Wife)  
Name of Former Spouse:

\_\_\_\_\_  
(First) (Middle) (Last)

Date of Marriage: \_\_\_\_\_ Date of termination of Marriage: \_\_\_\_\_

Cause of termination of Marriage: Death Divorce or Annulment (Circle One)

*List all children, but designate who is the parent if not a child of both husband & wife.*

**CHILDREN:**

(1) Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

\_\_\_\_\_  
(First) (Middle) (Last)

Present Address, if different from yours: \_\_\_\_\_ Phone No. \_\_\_\_\_  
(Street) (City) (State) (Zip)

(2) Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

\_\_\_\_\_  
(First) (Middle) (Last)

Present Address, if different from yours: \_\_\_\_\_ Phone No. \_\_\_\_\_  
(Street) (City) (State) (Zip)

(3) Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

\_\_\_\_\_  
(First) (Middle) (Last)

Present Address, if different from yours: \_\_\_\_\_ Phone No. \_\_\_\_\_  
(Street) (City) (State) (Zip)

(4) Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
(First) (Middle) (Last)

Present Address, if different from yours: \_\_\_\_\_ Phone No. \_\_\_\_\_  
(Street) (City) (State) (Zip)

(5) Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
(First) (Middle) (Last)

Present Address, if different from yours: \_\_\_\_\_ Phone No. \_\_\_\_\_  
(Street) (City) (State) (Zip)

(6) Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
(First) (Middle) (Last)

Present Address, if different from yours: \_\_\_\_\_ Phone No. \_\_\_\_\_  
(Street) (City) (State) (Zip)

**EXECUTORS, TRUSTEES AND GUARDIANS:**

**Husband's Will**

**EXECUTOR(S):** (Person who pays debts, files tax returns & liquidates certain assets)

\_\_\_\_\_  
Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Husband: \_\_\_\_\_

1st Alternate Executor(s):

\_\_\_\_\_  
Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Husband: \_\_\_\_\_

2nd Alternate Executor(s):

\_\_\_\_\_  
Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Husband: \_\_\_\_\_

**TRUSTEE(S):** (Person who invests & distributes money and other assets)

---

Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Husband: \_\_\_\_\_

1st Alternate Trustee:

---

Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Husband: \_\_\_\_\_

2nd Alternate Trustee:

---

Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Husband: \_\_\_\_\_

**GUARDIAN:** (Person who raises any minor child(ren))

---

Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Husband: \_\_\_\_\_

1st Alternate Guardian:

---

Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Husband: \_\_\_\_\_

2nd Alternate Guardian:

---

Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Husband: \_\_\_\_\_

**Wife's Will:**

**EXECUTOR(S):** (Person who pays debts, files tax returns & liquidates certain assets)

\_\_\_\_\_  
Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Wife: \_\_\_\_\_

1st Alternate Executor(s):

\_\_\_\_\_  
Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Wife: \_\_\_\_\_

2nd Alternate Executor(s):

\_\_\_\_\_  
Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Wife: \_\_\_\_\_

**TRUSTEE(S):** (Person who invests & distributes money and other assets)

\_\_\_\_\_  
Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Wife: \_\_\_\_\_

1st Alternate Trustee:

\_\_\_\_\_  
Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Wife: \_\_\_\_\_

2nd Alternate Trustee:

\_\_\_\_\_  
Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Wife: \_\_\_\_\_



**GUARDIAN:** (Person who raises any minor child(ren))

\_\_\_\_\_  
 Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Wife: \_\_\_\_\_

1st Alternate Guardian:

\_\_\_\_\_  
 Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Wife: \_\_\_\_\_

2nd Alternate Guardian:

\_\_\_\_\_  
 Address: \_\_\_\_\_ Phone No. \_\_\_\_\_

Relationship to Wife: \_\_\_\_\_

**OTHER BENEFICIARIES NAMED IN WILL (Relatives, Friends, Charities, Etc.):**

Name: \_\_\_\_\_  
 Relationship: \_\_\_\_\_  
 Home Address: \_\_\_\_\_

Name: \_\_\_\_\_  
 Relationship: \_\_\_\_\_  
 Home Address: \_\_\_\_\_

Name: \_\_\_\_\_  
 Relationship: \_\_\_\_\_  
 Home Address: \_\_\_\_\_

**ESTATE INFORMATION** (A personal financial statement may be used in lieu of the following through the end of Page 8. Please complete Pages 9 and 10 in any case.)

| <b>Real Estate</b> Please use these descriptions in the TYPE column for your Real Estate assets. |                     |               |                 |                     |
|--|---------------------|---------------|-----------------|---------------------|
|  | Primary Residence   | Land          | Rental Home     | Commercial Property |
|  | Secondary Residence | Vacation Home | Rental Property |                     |
| <b>TYPE</b>  | <b>OWNER</b>        |               |                 | <b>ASSET VALUE</b>  |
|  | Co-Owned            | Husband       | Wife            |                     |
|  | Co-Owned            | Husband       | Wife            |                     |
|  | Co-Owned            | Husband       | Wife            |                     |
|  | Co-Owned            | Husband       | Wife            |                     |

| <b>Bank Account</b> Please use these descriptions in the TYPE column for your Bank Account assets. |              |         |         |                    |
|--|--------------|---------|---------|--------------------|
|  | Checking     | CD      | Savings | Money Market       |
| <b>TYPE</b>  | <b>OWNER</b> |         |         | <b>ASSET VALUE</b> |
|  | Co-Owned     | Husband | Wife    |                    |
|  | Co-Owned     | Husband | Wife    |                    |
|  | Co-Owned     | Husband | Wife    |                    |
|  | Co-Owned     | Husband | Wife    |                    |
|  | Co-Owned     | Husband | Wife    |                    |
|  | Co-Owned     | Husband | Wife    |                    |

| <b>Investment</b> Please use these descriptions in the TYPE column for your Investment assets. |              |                  |       |                    |
|--|--------------|------------------|-------|--------------------|
|  | Bonds        | Ltd. Partnership | Stock | Mutual Fund        |
| <b>TYPE</b>  | <b>OWNER</b> |                  |       | <b>ASSET VALUE</b> |
|  | Co-Owned     | Husband          | Wife  |                    |
|  | Co-Owned     | Husband          | Wife  |                    |
|  | Co-Owned     | Husband          | Wife  |                    |
|  | Co-Owned     | Husband          | Wife  |                    |
|  | Co-Owned     | Husband          | Wife  |                    |
|  | Co-Owned     | Husband          | Wife  |                    |
|  | Co-Owned     | Husband          | Wife  |                    |

| <b>Retirement</b> Please use these descriptions in the TYPE column for your Retirement assets. |                        |              |         |                    |
|--|------------------------|--------------|---------|--------------------|
|  | 401K<br>Qualified Plan | IRA<br>Other | SEP/IRA | 403b               |
| <b>TYPE</b>  | <b>OWNER</b>           |              |         | <b>ASSET VALUE</b> |
|  | Co-Owned               | Husband      | Wife    |                    |
|  | Co-Owned               | Husband      | Wife    |                    |
|  | Co-Owned               | Husband      | Wife    |                    |
|  | Co-Owned               | Husband      | Wife    |                    |
|  | Co-Owned               | Husband      | Wife    |                    |
|  | Co-Owned               | Husband      | Wife    |                    |

| <b>Business</b> Please use these descriptions in the TYPE column for your Business assets. |  |                                      |                    |
|--|--|--------------------------------------|--------------------|
| General Partnership  | C Corporation<br>Ltd. Partnership (Bus.) | Sole Proprietorship<br>S Corporation | PA<br>LLC<br>FLP   |
| <i>TYPE</i>  | <i>ENTITY NAME</i>                       | <i>OWNER</i>                         | <i>ASSET VALUE</i> |
|  |  | Co-Owned Husband Wife                |                    |
|  |  | Co-Owned Husband Wife                |                    |
|  |  | Co-Owned Husband Wife                |                    |
|  |  | Co-Owned Husband Wife                |                    |
|  |  | Co-Owned Husband Wife                |                    |
|  |  | Co-Owned Husband Wife                |                    |

| <b>Other</b> Please use these descriptions in the TYPE column for your Other assets. |              |               |      |                    |
|--|--------------|---------------|------|--------------------|
| Collectibles<br>Household & Personal Effects   | Vehicles     | Miscellaneous |      |                    |
| <i>TYPE</i>  | <i>OWNER</i> |               |      | <i>ASSET VALUE</i> |
|  | Co-Owned     | Husband       | Wife |                    |
|  | Co-Owned     | Husband       | Wife |                    |
|  | Co-Owned     | Husband       | Wife |                    |
|  | Co-Owned     | Husband       | Wife |                    |
|  | Co-Owned     | Husband       | Wife |                    |

| <b>Liability</b> Please use these descriptions in the TYPE column for your Liability assets. |               |            |      |                    |
|--|---------------|------------|------|--------------------|
| Mortgage   | Personal Loan | Other Loan |      |                    |
| <i>TYPE</i>  | <i>OWNER</i>  |            |      | <i>AMOUNT OWED</i> |
|  | Co-Owned      | Husband    | Wife |                    |
|  | Co-Owned      | Husband    | Wife |                    |
|  | Co-Owned      | Husband    | Wife |                    |
|  | Co-Owned      | Husband    | Wife |                    |
|  | Co-Owned      | Husband    | Wife |                    |

**Insurance** Please use these descriptions in the TYPE column for your Insurance assets.

Individual Term (T)      Whole Life (WL)      Universal Life (UL)  
 Group Term (GpT)      Variable Life (VL)

| <i>TYPE</i> | <i>OWNER</i>                | <i>BENEFICIARIES</i> | <i>CASH VALUE</i> | <i>Death Benefit</i> |
|-------------|-----------------------------|----------------------|-------------------|----------------------|
|             | Co-Owned    Husband    Wife |                      |                   |                      |
|             | Co-Owned    Husband    Wife |                      |                   |                      |
|             | Co-Owned    Husband    Wife |                      |                   |                      |
|             | Co-Owned    Husband    Wife |                      |                   |                      |
|             | Co-Owned    Husband    Wife |                      |                   |                      |

**PROFESSIONAL ADVISORS:**

CPA \_\_\_\_\_  
 NAME

\_\_\_\_\_ FIRM

\_\_\_\_\_ ADDRESS

\_\_\_\_\_ PHONE NO.

**BROKER:** \_\_\_\_\_  
 NAME

\_\_\_\_\_ FIRM

\_\_\_\_\_ ADDRESS

\_\_\_\_\_ PHONE NO.

**INSURANCE AGENT:** \_\_\_\_\_  
 NAME

\_\_\_\_\_ FIRM

\_\_\_\_\_ ADDRESS

\_\_\_\_\_ PHONE NO.

