

ESTATE PLANNING QUESTIONNAIRE (Couple)

LAST NAME

DATE

PERSONAL INFORMATION

Names as they appear on your government issued photo ID:

Are you and your spouse filing out this form jointly? Yes No

Other names used: _____

Home address: _____

Phone : Home _____ **Cell** _____

E-mail address: _____

Date of Birth: _____

Citizenship: _____

Do you want a Will? Yes No

Do you want a Durable Power of Attorney? Yes No

Do you want a Living Will? Yes No

Names and ages of children (even if not a beneficiary):

Is anyone dependent upon you for support or do you have any permanently disabled children? _____

AGENTS

Please include name as it appears on govt. ID and relationship to you

LAST WILL AND TESTAMENT:

Executor for Will _____

Relationship - Spouse? _____

Successor Executor & Relationship: _____

Guardian(s) for minor children _____

Relationship _____

Successor guardians & Relationship _____

Trustee - relevant if there is a chance a young person might receive a share. For example, a grandchild if one of your children predeceases you.

Name & Relationship _____

Successor Trustee & Relationship _____

Ages for distributions of trust principle _____

POWER OF ATTORNEY:

Agent for Power of Attorney

Relationship - Spouse? _____

Successor Agent & Relationship _____

LIVING WILL:

Agent for Living Will _____

Relationship - Spouse? _____

Successor Agent & Relationship _____

DISTRIBUTIONS UNDER LAST WILL AND TESTAMENT

BENEFICIARIES & ALTERNATES

Primary Beneficiary or Beneficiarie:

Name	Relationship	Percentage/ Amt.
_____	<u>Spouse</u> _____	_____
_____	_____	_____
_____	_____	_____

Contingent Beneficiaries:

Name	Relationship	Percentage/ Amt.
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

If a beneficiary pre-deceases me, I want their share of the Estate (choose one):

- A. To be divided equally among the other beneficiaries.
- B. To go to the deceased beneficiary's children.
- C. Other - _____

If none of my named Beneficiaries or Contingent Beneficiaries survive me, I want my Estate (choose one):

- A. To be divided into two shares - one going to my spouse's family of origin and one going to my family of origin.
- B. To go entirely to (circle one) my / my spouse's family of origin.
- C. To go to named charities _____

- D. Other _____

QUESTIONS FOR WILL:

- | | | | |
|----|---|----------------------------------|-----|
| 1. | Total value of all assets | less than \$3 million | ___ |
| | | > \$3 million but < \$5 million | ___ |
| | | > \$5 million but < \$10 million | ___ |
| | | greater than \$10 million | ___ |
| 2. | Have you or your spouse ever filed a gift tax return? | Yes | No |
| 3. | Do you have any real estate interests other than your primary residence?
If so where & how titled? _____ | Yes | No |
| 4. | Do you have any interests in a closely held business, partnership or trust? | Yes | No |
| 5. | Are you a party to a Buy/Sell or Stock Redemption agreement? | Yes | No |
| 6. | Have you been given a Power of Appointment? | Yes | No |
| 7. | Do you have children from a relationship with someone other than your current spouse? | Yes | No |
| 8. | Do you have any Pre or post-nuptial agreements? | Yes | No |
| 9. | Are there any medical conditions which affect your estate planning? | Yes | No |

QUESTIONS, CALL DAWN SUTPHIN 610-246-5090

DAWN GETTY SUTPHIN, ESQUIRE

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