

Law Offices of  
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ESTATE PLANNING • INHERITANCE PROTECTION

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## Estate Planning Survey

### Section One Personal Information

<p><b><i>Family Information</i></b></p> <p>Print the name of each member of your immediate family, including yourself, as you would expect it to appear on legal documents, along with informal nicknames if appropriate. Please include your home address, telephone numbers, e-mail addresses, and birth dates. If married, please include your wedding date.</p> <p>Please do not include any social security numbers.</p>	
<p><b><i>Occupation</i></b></p> <p>Please describe your occupation and the name of your employer. If retired, please describe your primary occupation prior to retirement.</p>	

	<b>QUESTION</b>	<b>YES</b>	<b>NO</b>
<b>1</b>	Do you (and your spouse) have an existing will?		
<b>2</b>	Do you (or your spouse) have any property currently located outside the State of Arizona?		
<b>3</b>	Are you (or your spouse) currently a trustor, trustee, or beneficiary of a Trust?		
<b>4</b>	Have you ever filed a federal gift tax return? (Form 709)		
<b>5</b>	Have you (or your spouse) ever been divorced? If yes, please be prepared to share relevant information.		
<b>6</b>	If married, do you have a pre- or post-nuptial agreement in effect?		
<b>7</b>	Do you regularly attend a church or place of worship?		
<b>8</b>	Are you (or your spouse) a veteran of a U.S. war?		
<b>9</b>	Do you ever participate in option trading or margin accounts?		
<b>10</b>	Do you have a prearranged burial or cremation plan? If yes, please be prepared to share relevant information.		
<b>11</b>	Have you ever met with an estate planning attorney before?		
<b>12</b>	Do you (and your spouse) have a health care power of attorney signed in Arizona more recently than 2007?		
<b>13</b>	Do you (and your spouse) have a general durable power of attorney signed in Arizona more recently than 2008?		
<b>14</b>	Do you have any pets?		
<b>15</b>	Do you own any federally-regulated NFA firearms?		
<b>16</b>	Have you met with a professional financial advisor during the past year?		

**Section Two  
Financial Information**

<p><b><i>Life Insurance</i></b></p> <p>Provide a list summarizing any life insurance policies you have. State the name of the insured, the company (and policy number, if available), the type of policy, the beneficiaries, the death benefit amount, the cash surrender value (if any), and any other relevant information.</p>	
<p><b><i>Retirement Accounts</i></b></p> <p>Provide a list summarizing any retirement accounts that you have. State the name of the account holder, the company, the type of account, the beneficiaries, and any other relevant information.</p>	
<p><b><i>Business Interests</i></b></p> <p>Please describe any ownership interest you (or your spouse) have in a business. This includes stock in a closely-held corporation, limited partnership interests, or LLC membership interests.</p>	

**List of Assets**

Provide a description of the assets you own along with an estimate of their current values. If you wish, you may simply attach a list of assets created by a financial software program such as Quicken or Quickbooks, or an up-to-date worksheet on file with your financial advisor.

For real estate, include the approximate pay-off amount for any mortgage-related debt.

The purpose of this exercise is to help me determine the organization, value, and liquidity of your assets for estate planning purposes.

### Section Three Estate Planning Objectives

	<b>Let's Deal With This</b>	<b>I want to Learn More, then Decide</b>	<b>Let's Not Deal with This</b>
<p><b><i>Fulfill Parenting Responsibilities</i></b> Make certain that your dependent children are taken care of in the event of your death.</p>			
<p><b><i>Get Organized</i></b> Avoid unnecessary costs, delays, and frustrations upon your incapacity or death.</p>			
<p><b><i>Protect Inheritance for Heirs</i></b> Protect your heirs from “getting too much, too soon” or from major loss due to their poor spending habits, creditor issues, or divorce.</p>			
<p><b><i>Model Good Stewardship</i></b> Minimize estate, gift, and income taxes before and after your death.</p>			
<p><b><i>Protect Assets During Lifetime</i></b> Implement legal strategies to protect your assets during lifetime from “creditors, predators, in-laws, and out-laws.”</p>			

### Section Four Questions to Think About

<b><i>How do you want to be remembered?</i></b>	
<b><i>What decisions have contributed most to your success in life?</i></b>	
<b><i>What gives meaning or purpose to your life?</i></b>	