

Estate Planning Questionnaire

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* Required

1. Email address *

2. Your Name and Birth Date *

Enter your name as you would expect it to appear on legal documents, along with informal nickname if applicable. Also include your birth date.

3. Your Spouse

If applicable, enter your spouse's name as you would expect it to appear on legal documents, along with informal nickname if applicable. Also include your spouse's birth date and your wedding date.

4. Your Contact Information *

Enter your mailing address and mobile phone number(s).

5. Children

Enter the names of your children - both adult and minor children - including birth dates. Identify stepchildren if applicable.

6. Occupation

Please describe your occupation(s) and the name(s) of your employer. If retired, please describe your primary occupation(s) prior to retirement.

7. Have you ever met with an estate planning lawyer before?

Mark only one oval.

Yes

No

8. Do you (and your spouse) have a valid will?

Mark only one oval.

Yes

No

Not sure

9. Do you (and your spouse) have a revocable living trust?

Mark only one oval.

Yes

No

Not sure

10. Did you (or your spouse) ever get divorced?

If yes, please be prepared to share relevant information.

Mark only one oval.

Yes

No

11. If married, do you have a prenuptial agreement in effect?

Mark only one oval.

Yes

No

Not sure

12. Do you have a prearranged burial or cremation plan?

Mark only one oval.

Yes

No

13. Do you regularly attend a church?

Mark only one oval.

Yes

No

It's complicated

14. Do you ever make investments using option trading or margin accounts?

Mark only one oval.

Yes

No

Not sure

15. Do you (and your spouse) have a health care power of attorney signed within the past 10 years?

Mark only one oval.

- Yes
 No
 Not sure

16. Do you (and your spouse) have a financial power of attorney signed within the past 10 years?

Mark only one oval.

- Yes
 No
 Not sure

17. Do you have any pets?

Mark only one oval.

- Yes
 No

18. Do you own any federally-regulated NFA firearms?

NFA firearms include suppressors, short barreled rifles, machine guns, etc.

Mark only one oval.

- Yes
 No
 Not sure

19. Do you meet regularly with a professional financial advisor?

Mark only one oval.

- Yes
 No

20. Do you own the home you live in? *

Mark only one oval.

- Yes, free and clear
- Yes, but there is a mortgage
- No, someone else owns it

21. Do you own any other real estate? *

Mark only one oval.

- Yes
- No

22. Bank Accounts

Provide a list of any checking or savings accounts you own that usually have more than \$10,000. Include name of financial institution and the approximate value of each account.

23. Brokerage Accounts (non-retirement)

Provide a list of any brokerage accounts you own (non-retirement). Include name of financial institution and the approximate value of each account.

24. Retirement Accounts (IRA, 401k, 403b, etc.)

Provide a list summarizing any retirement accounts or annuities you own (company, type of account, current value, beneficiaries)

25. Life Insurance

Provide a list summarizing any life insurance policies you own (company, type of policy, death benefit, beneficiaries)

26. Business Interests

Provide a list summarizing any small business ownership interests you own.

27. Estate Planning Objective #1 - Fulfill Parenting Responsibilities *

The #1 objective of estate planning is to make certain that your dependent children are taken care of in the event of your death. Do we need to review this topic?

Mark only one oval.

- Let's deal with this
- I want to learn more, then decide
- Let's not deal with this

28. Estate Planning Objective #2 - Get Organized *

The #2 objective of estate planning is to avoid unnecessary costs, delays, and frustrations upon your incapacity or death. Do we need to review this topic?

Mark only one oval.

- Let's deal with this
- I want to learn more, then decide
- Let's not deal with this

29. Estate Planning Objective #3 - Protect Inheritance for Heirs *

The #3 objective of estate planning is to protect inheritance as a precautionary measure against future threats to a beneficiary (lawsuits, divorce, debt collectors) or in response to a clear and present danger related to a beneficiary (spendthrift habits, special needs, susceptibility to undue influence, need to maintain beneficiary's qualification for government health benefits or supplemental income benefits) Do we need to review this topic?

Mark only one oval.

- Let's deal with this
- I want to learn more, then decide
- Let's not deal with this

30. Estate Planning Objective #4 - Model Good Stewardship *

The #4 objective of estate planning is to minimize estate, gift, and income taxes before and after your death. Do we need to review this topic?

Mark only one oval.

- Let's deal with this
- I want to learn more, then decide
- Let's not deal with this

31. Estate Planning Objective #5 - Protect Assets During Lifetime *

The #5 objective of estate planning is to implement legal strategies to shield your assets during lifetime from "creditors, predators, in-laws, and out-laws." Do we need to review this topic?

Mark only one oval.

- Let's deal with this
- I want to learn more, then decide
- Let's not deal with this

32. Signature *

Please enter your name here to sign the questionnaire:

33. Date *

Please enter today's date.

Example: January 7, 2019

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