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CONFIDENTIAL ESTATE PLANNING DATA QUESTIONNAIRE

I. FAMILY INFORMATION

HUSBAND:

Name: _____

Address and
Telephone No.: _____

Occupation: _____

Business Address: _____

Business Phone: _____

Date of Birth: _____

WIFE:

Name: _____

Address and
Telephone No.: _____

Occupation: _____

Business Address: _____

Business Phone: _____

Date of Birth: _____

Name, address and age of children and grandchildren - indicate if adopted (a) or if child of only husband (H) or wife (W). If married, list name of spouse.

NAME: _____ DATE OF BIRTH: _____

ADDRESS: _____

NAME: _____ DATE OF BIRTH: _____

ADDRESS: _____

NAME: _____ DATE OF BIRTH: _____

ADDRESS: _____

NAME: _____ DATE OF BIRTH: _____

ADDRESS: _____

NAME: _____ DATE OF BIRTH: _____

ADDRESS: _____

NAME: _____ DATE OF BIRTH: _____

ADDRESS: _____

If no living descendants, names and addresses of nearest relatives (parents, siblings, parent siblings, cousins, etc.)

NAME:

ADDRESS: _____

NAME:

ADDRESS:

NAME:

ADDRESS: _____

List name and address of any person not listed previously to whom you wish to leave property.
Please identify the specific property you wish you leave to each person.

NAME:

ADDRESS:

PROPERTY:

NAME:

ADDRESS:

PROPERTY: _____

List names and addresses of persons (or banks) whom you wish appointed executor and/or trustee under you will in order of priority.

(An executor is the person (or entity, e.g., a bank or trust company) who will have the legal responsibility to see that the instructions in your will are carried out and your property is distributed in accordance with you will. The common choice is one's spouse, although any legally competent person can serve, whether or not they are a beneficiary under the will. Under the laws of most states, including New York and Connecticut, an Executor of a will is entitled to a commission payable for their services by the Estate. An alternate appointment is advisable.)

NAME:

ADDRESS:

NAME:

ADDRESS:

NAME:

ADDRESS:

List names and addresses of persons whom you wish appointed guardian of a minor child or children in order of priority.

(A guardian is the person who will have the legal responsibility to manage and protect the legal and financial interests of minor children (i.e. under the age of eighteen (18) years) in the event both parents are deceased. The common choice is a parent of the person making the will or other relative, although it generally may be any legally competent adult. An alternate appointment is advisable.)

NAME:

ADDRESS:

NAME:

ADDRESS:

II. SCHEDULE OF ASSETS

Please complete the following schedule briefly describing your assets, your spouse's assets and assets in joint names with approximate values.

	HUSBAND	WIFE	JOINT
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Home
(Address and Value)

Mortgage _____
Other Real Estate

(Location and Value)

Stocks (Aggregate
value and where
located)

Bonds (Aggregate
value and where
located)

Certificate of
Deposit (Bank and
Value)

Savings Accounts
(Bank and Balance)

Checking Account
(Bank and Balance)

Furniture and Autos
(Value only)

Location of safe deposit box.

Brief description and approximate value of other significant tangible property such as works of art, valuable stamp or coin collections, valuable jewelry.

Brief description and approximate value of interest in closely held corporations, partnership interests, powers of appointment.

III. LIFE INSURANCE (including any group insurance)

ON LIFE OF HUSBAND

Policy #1

Policy #2

Policy #3

Policy #4

Company: _____

Policy No.: _____

Face Amount: _____

Cash Value: _____

Type
(Term, etc):

Owner:

Beneficiary:

ON LIFE OF WIFE

Policy #1

Policy #2

Policy #3

Policy #4

Company:

Policy No.:

Face Amount:

Cash Value:

Type
(Term, etc):

Owner:

Beneficiary:

IV. EMPLOYEE BENEFITS

Brief description, including beneficiary after your death, of Employee Benefits.

Pension Plan:

Profit-Sharing Plan:

Health Insurance:

V. ESTIMATE OF CURRENT DEBTS AND LIABILITIES

VI. TRUSTS AND EXPECTANCIES

Trusts (brief description, including name of grantor, date of creation, approximate value and nature of your interest)

Potential Inheritance (brief description, including approximate value)

VII. SPECIAL CIRCUMSTANCES, IF ANY