



CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

PERSONAL INFORMATION

Date: _____

<i>Name (list name as you want on your documents)</i>	<i>Home Telephone</i>
<i>Home Address (street, city, state and zip code)</i>	
<i>Birth Date</i>	<i>Business Telephone</i>
<i>Social Security Number</i>	<i>Mobile/Cell Telephone</i>
<i>Years lived in state of residence</i>	<i>Email Address</i>

OTHER INFORMATION

	Yes	No
A. Are you a United States citizen? If not, what country:	<input type="checkbox"/>	<input type="checkbox"/>
B. Have you made any large gifts? (exceeding \$3,000 prior to 1982 and \$10,000 during or after 1982)	<input type="checkbox"/>	<input type="checkbox"/>
C. Have you received an inheritance? If yes, indicate amount and year:	<input type="checkbox"/>	<input type="checkbox"/>
D. Do you expect to receive any gifts or inheritances in the future?	<input type="checkbox"/>	<input type="checkbox"/>
E. Are you a beneficiary of a trust?	<input type="checkbox"/>	<input type="checkbox"/>
F. Do you own any real estate outside your state of residence? If so, indicate state and county and include the property address on the attached net worth statement.	<input type="checkbox"/>	<input type="checkbox"/>
G. Do you own a business which has made an "s" election for income tax purposes?	<input type="checkbox"/>	<input type="checkbox"/>
H. Do you have any dependents with special needs?	<input type="checkbox"/>	<input type="checkbox"/>
I. Have any of your children received (or are likely to receive) any government assistance, such as SSI? If so who:	<input type="checkbox"/>	<input type="checkbox"/>
J. Has anyone in your family been adopted? Please attach explanation	<input type="checkbox"/>	<input type="checkbox"/>
K. Do you have any deceased children?	<input type="checkbox"/>	<input type="checkbox"/>

L. Do you have any of the following estate planning documents?		
Will	<input type="checkbox"/>	<input type="checkbox"/>
Power of Attorney	<input type="checkbox"/>	<input type="checkbox"/>
Revocable Living Trust	<input type="checkbox"/>	<input type="checkbox"/>
Other Trust	<input type="checkbox"/>	<input type="checkbox"/>
Health Care Durable Power of Attorney/Directive	<input type="checkbox"/>	<input type="checkbox"/>
Oregon Advance Directive	<input type="checkbox"/>	<input type="checkbox"/>
Physician Orders for Life Sustaining Treatment (POLST)	<input type="checkbox"/>	<input type="checkbox"/>
M. Do you own a long-term care insurance policy?	<input type="checkbox"/>	<input type="checkbox"/>

If yes, please provide copies of relevant documents

ADVISOR INFORMATION

Accountant/Tax Preparer:

Name **Telephone**

Address

Investment Counselor:

Name **Telephone**

Address

Casualty and
Homeowners Insurance
Agent:

Name **Telephone**

Address

CHILDREN

(list name as you want it on your documents)

	First Child	Second Child
Name		
Date of Birth		
Address		
Name of Child's Spouse		
	Third Child	Fourth Child
Name		
Date of Birth		
Address		
Name of Child's Spouse		

FIDUCIARY CHOICES

Executor/Personal Representative

Your personal representative is responsible for settling the financial affairs of your estate, including the investment of your assets, paying any final bills and distributing your assets in accordance with your Last Will.

First Choice	
Address	
Telephone	
Second Choice	
Address	
Telephone	
Third Choice	
Address	
Telephone	
Comments:	

Trustee

Your trustee manages your assets for the benefit of your beneficiaries after your death. Trusts are often used to protect beneficiaries, such as young children, from making ill-advised investments and spending decisions or to protect assets from the beneficiary's creditors (including situations involving divorce). Trusts can last for many years. Please consider this when selecting your trustee.

First Choice	
Address	
Telephone	
Second Choice	
Address	
Telephone	
Third Choice	
Address	
Telephone	
Comments:	

Guardian for Children

After your death, your guardian will be responsible for the care and upbringing of your children (or other dependents in your care) so long as they are minors or otherwise incapacitated.

First Choice	
Address	
Telephone	
Second Choice	
Address	
Telephone	
Third Choice	
Address	
Telephone	
Comments:	

Durable Power of Attorney

A Durable Power of Attorney is a document appointing another person (called the "attorney-in-fact") to make financial and health care decisions for you if you become incapacitated or disabled.

A. Attorney-in-Fact (Financial). Powers include the purchase and sale of property; access to financial records and accounts; investment of assets; continuation of business interests; and tax and estate planning.

First Choice	
Address	
Telephone	
Second Choice	
Address	
Telephone	
Third Choice	
Address	
Telephone	
Comments:	

NET WORTH STATEMENT

ASSETS

Real Estate

Home	\$
Vacation Home	\$
Business	\$
Other	\$

Personal Property

Home Furnishings	\$
Vehicles	\$
Jewelry, Collections, etc.	\$
Other	\$

Life Insurance

<i>Total of all policies</i>	\$
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Cash in Bank

Checking Account	\$
Savings Account	\$
Other Accounts	\$

Retirement Plans

IRA	\$
401(K)	\$

Other Investments

Stocks	\$
Bonds	\$
Mutual Funds	\$
Annuities	\$

Other

Trust Assets	\$
Foreign Assets	\$
Miscellaneous	\$

TOTAL ASSETS \$

LIABILITIES

Mortgages/Contracts Owing

Home	\$
Vacation Home	\$
Business	\$
Other	\$

Loans

Vehicles	\$
Personal	\$
Life Insurance	\$
Other	\$

TOTAL LIABILITIES \$

TOTAL ASSETS \$

Minus total liabilities \$

NET WORTH \$

Please list the address to any real estate **(including state and county)** owned outside your state of residence: