

**ESTATE PLANNING QUESTIONNAIRE**

*Law Offices of Samuel Z. Brown*

**GENERAL INFORMATION**

(1) Please give us your name as you wish it to appear in your will.

Name: \_\_\_\_\_ Age: \_\_\_\_\_

Residence: \_\_\_\_\_ Phone: \_\_\_\_\_

**YOUR FAMILY**

(1) Your Spouse.

Name: \_\_\_\_\_ Age: \_\_\_\_\_

(2) Your children:

| Name  | Age   | Spouse's Name | # Children |
|-------|-------|---------------|------------|
| _____ | _____ | _____         | _____      |
| _____ | _____ | _____         | _____      |
| _____ | _____ | _____         | _____      |

(3) Parents of you and your spouse, if living:

Your Parents' Names & Ages: \_\_\_\_\_

Spouses' Parents' Names & Ages: \_\_\_\_\_

(4) Other Individuals:

Please list below any persons you may wish to remember, either along with other members of your family, or in the event members of your direct family do not survive you.

| Name  | Age   | Relationship |
|-------|-------|--------------|
| _____ | _____ | _____        |
| _____ | _____ | _____        |

## **YOUR PROPERTY**

Please give us full information with respect to each of these questions and add anything which these questions call to mind. Please attach additional sheets of paper if necessary.

- (1) Account Information - List all accounts you currently have, indicate what type of account and the name of the bank.
- (2) Safe Deposit Boxes - Please give us the location of any safe deposit boxes in your name or in held jointly with someone else. Please also specify any documents or items kept in the box.
- (3) Personal Effects - Describe and List Estimated Value of any personal effects you may own (or jointly owned please give name of other owner) such as jewelry, clothing, automobiles, household goods, art, etc.
- (4) Securities - Please list any securities you currently own, including stocks, bonds, mutual funds, etc. If all securities are held at (a) brokerage house(s) please indicate the name of the firm and the broker's name.
- (5) Real Estate - Please list all real estate owned, either in your name alone or jointly with another or others (please indicate if jointly owned).
- (6) Life Insurance - Please list any insurance policies you currently own and their amounts.
- (7) Trusts and Estates. Are you the beneficiary of any trust or estate? If yes, please specify.
- (8) Business. Do you own or hold any interest in any business? If yes, please specify.

## **YOUR LIABILITIES**

Please list below any amounts owing by you to others, such as on notes, mortgages, etc., including pledges to charities, etc.