

Please complete this questionnaire to begin your estate planning process. All of the information will be kept confidential. When you have finished, please follow the instructions at the end of this worksheet to submit it to our office. Please call 513-721-1975 if you have any questions.

First Name Last Name Initial Birth Date

Spouse First Name Spouse Last Name Initial Birth Date

Street Address City

County of Residence State Zip Code

Email Address Home Phone Work Phone

Cell Ph. Marital Status

How were you referred to our office? Employer

What are the reasons that you would like to complete an estate plan? (Check all that apply)

- To avoid probate court proceedings
- To avoid federal estate tax
- To distribute assets to heirs
- To provide care for pets
- To make charitable gifts
- To appoint a guardian for children
- To manage property for children
- To transfer business or farm assets
- To prepare for physical or mental incapacity
- To care for a disabled family member

Please indicate a time within which your planning must be completed

- Are you a United States citizen? Yes No
- Is your spouse a U.S. citizen? Yes No Does not apply
- Do you have a prenuptial agreement with your spouse? Yes No Does not apply
- Do you already have a will or revocable trust? Yes No

Children

Name of 1st Child	<input type="text"/>	Age	<input type="text"/>	Relationship	<input type="text"/>
Name of 2nd Child	<input type="text"/>	Age	<input type="text"/>	Relationship	<input type="text"/>
Name of 3rd Child	<input type="text"/>	Age	<input type="text"/>	Relationship	<input type="text"/>
Name of 4th Child	<input type="text"/>	Age	<input type="text"/>	Relationship	<input type="text"/>
Name of 5th Child	<input type="text"/>	Age	<input type="text"/>	Relationship	<input type="text"/>
Name of 6th Child	<input type="text"/>	Age	<input type="text"/>	Relationship	<input type="text"/>

Check if you have more than 6 children (add their names to "Special Instructions" section below).

Check if you anticipate having more children and would like them included as heirs.

Asset Information

Directions: Current asset information is critical for us to advise you regarding estate taxes, and coordinating your estate plan. You may use estimated values. Do not include account numbers. Additional asset information can be noted in the "Additional Questions" box. Please round off to the nearest dollar.

IMPORTANT-If you enter an incorrect "current value" you must clear the entire field to insert a new value.

<u>Type of Asset</u>	<u>Current Value</u>	<u>Owner</u>	<u>Current Beneficiary</u>
Residence	<input type="text"/>	<input type="text"/>	<input type="text"/>
Commercial Property	<input type="text"/>	<input type="text"/>	<input type="text"/>
Farm Land	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Real Property	<input type="text"/>	<input type="text"/>	<input type="text"/>
Publicly Traded Stocks	<input type="text"/>	<input type="text"/>	<input type="text"/>
Government Bonds	<input type="text"/>	<input type="text"/>	<input type="text"/>
Corporate Bonds	<input type="text"/>	<input type="text"/>	<input type="text"/>
Business Assets	<input type="text"/>	<input type="text"/>	<input type="text"/>
Business Accounts	<input type="text"/>	<input type="text"/>	<input type="text"/>
Brokerage Account	<input type="text"/>	<input type="text"/>	<input type="text"/>

<u>Type of Asset</u>	<u>Current Value</u>	<u>Owner</u>	<u>Current Beneficiary</u>
Savings Accounts	<input type="text"/>	<input type="text"/>	<input type="text"/>
Checking Accounts	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certificates of Deposit	<input type="text"/>	<input type="text"/>	<input type="text"/>
IRA (1)	<input type="text"/>	<input type="text"/>	<input type="text"/>
IRA (2)	<input type="text"/>	<input type="text"/>	<input type="text"/>
401K (1)	<input type="text"/>	<input type="text"/>	<input type="text"/>
401K (2)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Life Insurance Policy (1)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Life Insurance Policy (2)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Life Insurance Policy (3)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Life Insurance Policy (4)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Annuities	<input type="text"/>	<input type="text"/>	<input type="text"/>
Education Account	<input type="text"/>	<input type="text"/>	<input type="text"/>
All Motor Vehicles	<input type="text"/>	<input type="text"/>	<input type="text"/>
Household Goods	<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal Collections	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Assets	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Asset Value	<input type="text"/>		
Current Liabilities	<input type="text"/>	<<<< Include all of your mortgage and consumer debt	
Net Estate Value	<input type="text"/>		

Distribution of Assets

Please tell us how you would like to distribute your assets. Use the last section for special instructions.

Specific Gift Beneficiaries

(Optional) Complete this section to give cash or specific gifts to individuals or organizations - before any property is given to other heirs. Use this section only for cash gifts of a specific dollar amount - not fractional shares, or specific items of personal property. Items of personal property should only include items of particular sentimental or special value. Such gifts should be used sparingly.

Cash Gifts
(Amount and Name
of Beneficiary)

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Specific Gifts
(Item and Name of
Beneficiary)

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Primary Beneficiaries

(Required) Primary beneficiaries will receive all property that is not designated in your Personal Property Memorandum or Cash Gifts. Select one of the options below to name your primary beneficiaries. Use the box at the end of this section for special instructions.

- To my spouse, and then to my surviving children, or if any of my children do not survive me, then to my grandchildren (i.e., grandchildren are included if any of your children predecease you).
- To my spouse, and then to my surviving children in equal shares (i.e., grandchildren are excluded if any of your children predecease you).
- To my spouse, and then to one or more alternate beneficiaries (i.e., you are married and do not have children).
- To my children in equal shares, or if any of my children do not survive, then to my grandchildren (i.e., you have children and are not married).
- My primary beneficiaries are named below (i.e., none of the other options apply):

Primary Beneficiaries
(Full Name, Relationship
to You, and Amount of
Gift in Percentage or
Fraction)

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Alternate Beneficiaries

(Optional) Alternate beneficiaries inherit property if the primary beneficiaries are deceased. This is optional, but we suggest that you designate alternate beneficiaries.

Directions: State in your own words who you want to inherit your property if the primary beneficiaries are deceased. Use any combination that you would like, and don't be concerned with formality. We will draft the final version for you.

Suggestion: Married couples should consider distributing property to each of their families so that the outcome is the same regardless of which spouse dies first. For example, "I give 1/2 to my brother Joseph Smith and my sister Susan Johnson, in equal shares; and, 1/2 to my sister-in-law Mary Wilson , my brother-in-law John Stevens, and my brother-in-law Richard Stevens, in equal shares."

Alternate Beneficiaries for Male
Spouse or Single Person
(Full Name, Relationship, and
Amount of Gift in Percentage or
Fraction)

Name the same alternate beneficiaries for both spouses.

Alternate Beneficiaries for
Female Spouse
(Full Name, Relationship, and
Amount of Gift in Percentage or
Fraction)

Disinheritance

(Optional) You may identify family members that you want to prevent from inheriting your property.

Disinherited Persons
(Full Name and Relationship)

Special Instructions

(Optional) Use this section for questions or additional instructions. If you need additional room use the "Additional Questions" box on the last page.

Special Instructions

Appointments

In this section you will identify persons to act on your behalf to handle your affairs when you are not able to do so.

Personal Representative

A Personal Representative (executor) handles the property of a deceased person, and distributes it to the person's heirs. Any person over the age of 18 may be a Personal Representative. A spouse is generally appointed first. Appoint one or more persons.

For Male Spouse or Single Person

Primary Personal Rep.	<input type="text"/>	Relationship	<input type="text"/>
Alternate Personal Rep.	<input type="text"/>	Relationship	<input type="text"/>
2nd Alternate Personal Rep.	<input type="text"/>	Relationship	<input type="text"/>

For Female Spouse

Primary Personal Rep.	<input type="text"/>	Relationship	<input type="text"/>
Alternate Personal Rep.	<input type="text"/>	Relationship	<input type="text"/>
2nd Alternate Personal Rep.	<input type="text"/>	Relationship	<input type="text"/>

Trustee For Children

A Trustee should be appointed to manage property for the health, education and support of young children until they reach an age specified by you. The Trustee should be someone that is capable of managing assets in a prudent manner. Married parents should not appoint each other because a Trustee will only be needed if both parents are deceased.

Primary Trustee	<input type="text"/>	Relationship	<input type="text"/>
Alternate Trustee	<input type="text"/>	Relationship	<input type="text"/>
2nd Alternate Trustee	<input type="text"/>	Relationship	<input type="text"/>

Age at which assets should be distributed to heirs without supervision by a Trustee:

- All assets at: 19 21 25 30
- 1/2 at 21, and balance at 25
- 1/3 at 21, 1/3 at 25, and balance at 30
- 1/3 at 25, 1/3 at 30, and balance at 35

Guardian For Children

A Guardian is responsible for the day-to-day care of minor or incompetent children if the natural parents are deceased. Please name a primary and alternate Guardian if you have minor children. The Guardian and Trustee may be the same person. You may name two people as Co-Guardians. If so please indicate after the person's name. A Guardianship terminates upon the child reaching age 18 unless otherwise incapacitated. Skip this section if you do not have children.

Primary Guardian

Relationship

Alternate Guardian

Relationship

2nd Alternate Guardian

Relationship

Trustee for Revocable Trust

If you choose to avoid probate of your estate by executing a revocable trust (also called a living trust), you should name a successor trustee. The successor trustee would be responsible for managing your trust assets if you could not manage assets due to incompetency. The successor trustee would distribute assets to your beneficiaries after death, or continue to manage the trust for those beneficiaries where assets are not to be immediately distributed. The person you appoint should be someone you trust who is capable of managing your affairs in a prudent manner. Usually you serve as the primary trustee during your lifetime. A spouse is generally appointed as first successor trustee.

Make my spouse my successor trustee. I will list up to two alternates.

Successor Trustee
(Name, Address, Phone)

Relationship

2d Successor Trustee
(Name, Address, Phone)

Relationship

Agent For Durable Power of Attorney

A Durable Power of Attorney appoints a person to make personal and financial decisions on your behalf. It can be effective immediately or only in the event that you become incapacitated. A Power of Attorney terminates when you pass away. Please appoint a primary and alternate agent to act for you. The person you appoint should be someone you trust who is capable of managing your affairs in a prudent manner. A spouse is generally appointed first.

For Male Spouse or Single Person

- Make my wife my primary agent. I will list up to two alternates
- Check if you want your spouse to have power only if you are incapacitated.
- Check if you want the other agents to have power only if you are incapacitated.

Primary Agent
(Name, Address, Phone)

Relationship

Alternate Agent
(Name, Address, Phone)

Relationship

For Female Spouse

- Make my husband my primary agent. I will list up to two alternates
- Check if you want your spouse to have power only if you are incapacitated.
- Check if you want the other agents to have power only if you are incapacitated.

Primary Agent
(Name, Address, Phone)

Relationship

Alternate Agent
(Name, Address, Phone)

Relationship

Health Care Agent

You may appoint a "Patient Advocate" in a Health Care Directive to make medical decisions on your behalf if you become incapacitated. A Patient Advocate may also be authorized to terminate life support if you are terminally ill. Please name a primary and alternate Patient Advocate. A spouse is generally appointed first.

For Male Spouse or Single Person

- Check to appoint same persons as with Durable Power of Attorney

Primary Patient Advocate
(Name, Address, Phone)

Relationship

Alternate Patient Advocate
(Name, Address, Phone)

Relationship

Do you want to give the Patient Advocate authority to donate organs?

- No
- Yes, my organs may be used for any purpose, including scientific research (unlimited)
- Yes, but my organs may only be used for transplantation (limited)

For Female Spouse

- Check to appoint same persons as with Durable Power of Attorney

Primary Patient Advocate
(Name, Address, Phone)

Relationship

Alternate Patient Advocate
(Name, Address, Phone)

Relationship

Do you want to give the Patient Advocate authority to donate organs?

- No
- Yes, my organs may be used for any purpose, including scientific research (unlimited)
- Yes, but my organs may only be used for transplantation (limited)

Additional Questions or Instructions

If you have additional questions you would like us to review with you concerning your estate plan, special concerns or information that you would like us to consider, please enter them here.

Thank you for completing our estate planning worksheet. If you have additional information or questions, you can include them in your email or fax cover sheet. If you have trouble properly displaying this form or with its functionality you may need to update your Adobe Reader to the current version. You can download it for free here at www.Adobe.com.

Once you have completed your questionnaire please printout a copy for your records before submitting it.

If you would like to be able to save a filled-in copy of your form electronically, you can download the CutePDF Writer for free at www.Cutepdf.com. Then, when you have completed your form, print it out after selecting "CutePDF Writer" as your printer from the print screen. This will open a dialogue box allowing you to save a copy on your computer. More detailed instructions are available on their website.

Please follow these instructions to submit the worksheet:

For Windows XP/Vista/Windows 7 users with Adobe Reader version 7.0 or higher: The buttons below should be active. Please print a copy for your records by using "Print Form". Then send your worksheet to us by selecting "Submit by Email".

We will contact you shortly after receipt of the worksheet. Please call (513)721-1975 if you have questions.