



ESTATE PLANNING QUESTIONNAIRE

This Estate Planning Questionnaire requests information which we realize is very personal. However, the family and financial information will help us to better analyze your estate planning needs. All information contained in this questionnaire is *strictly confidential*. **Where you are entering a name, please always write out the full legal name of each person. Married couples please fill out Client 1 and Client 2. Single people please fill out Client 1 only.**

PERSONAL INFORMATION

CLIENT 1

CLIENT 2

Full Name _____

Cell Phone _____

Email Address _____

US Citizen _____

Home Address _____

County of Residence _____

Children of This Marriage (Names and Dates of Birth) _____

Prior Marriage Children, If Any _____

ASSETS

Estimated value of all assets, including life insurance: _____

Do you own any property outside of Texas, if so please describe? _____

Do you own any assets held as joint tenants with right of survivorship ("JTWROS")? _____
Have you created any trusts or are you the beneficiary of any trusts (other than a trust that was drafted at this firm)? Yes _____ No _____

DISTRIBUTION OF ASSETS

Please explain the way you want your property to pass under your will. Please consider how you would like to pass your property in the event that your primary beneficiaries do not survive you. You may also name charities. Please provide complete names for all beneficiaries and charities.

FIDUCIARY APPOINTMENTS

EXECUTORS

Your executor has the duty to settle your estate (including payment of any state or federal death or income taxes) and distribute your property to the beneficiaries named in your will. The executor may be a relative, a friend, a bank with an active trust department, or a private trust company. You may name two or more executors to act together if you wish. We recommend that you name successor executors in the event that your primary executor cannot act.

CLIENT 1

Primary Executor _____

1st Alternate _____

2nd Alternate _____

CLIENT 2

TRUSTEES

Your trustees will manage any trusts for your beneficiaries. The trustees will be authorized to provide funds as needed for the beneficiary's health, maintenance, support and education. We recommend that you name successor trustees in the event that your primary trustee cannot act. If appropriate, an adult beneficiary can be trustee of his or her own trust immediately or upon reaching a certain age.

CLIENT 1

Primary Trustee _____

1st Alternate _____

CLIENT 2

2nd Alternate _____

Children may become trustee of their own trust at age _____ (we recommend age 30 or 35).

POWERS OF ATTORNEY AND GUARDIAN

MEDICAL POWER OF ATTORNEY

You may name someone as your agent for the purpose of making medical or other health care decisions for you under a **medical power of attorney**, if you ever become incapable of making these decisions yourself. You may also express a desire that you do not want your life prolonged by artificial means by signing a **directive to physicians and family or surrogates** (a “**living will**.”) We recommend naming a successor agent in the event your primary agent cannot act.

CLIENT 1

CLIENT 2

Primary _____

1st Alternate _____

2nd Alternate _____

FINANCIAL POWER OF ATTORNEY

You may name someone as your “agent” or “attorney-in-fact” under a **durable power of attorney**. The agent will have authority to pay your bills, sell your assets, etc., if you **ever** become incompetent to do this yourself. Naming an agent can save a great deal in court costs and legal fees, but you should only name someone you trust completely. Two people can act together at the same time.

CLIENT 1

CLIENT 2

Primary _____

1st Alternate _____

2nd Alternate _____

GUARDIANS FOR MINOR CHILDREN

If your spouse survives you, he or she is the natural guardian of your joint minor children. A child is a “minor” in Texas if that child is under 18 years of age. In the event your spouse does not survive you, we recommend that you designate in a separate written instrument a guardian for your minor children. The guardian has the responsibility for raising your children. You may name an individual or a married couple as guardians; however, when naming married couples, we recommend that you choose one person out of that couple whom you trust the most, in the event that the married couple divorces.

Primary _____

1st Alternate _____

2nd Alternate _____

Please state any other information or family concerns that we need to consider in your estate plan. _____
