

ESTATE PLANNING QUESTIONNAIRE

Part 1 – People

Client 1

Legal Name _____

Birthdate _____ SSN _____ Email _____

Address _____ City _____ State _____ Zip _____

Home Phone _____ Alternate Phone _____

Are you a US citizen? Yes No

Client 2

Legal Name _____

Birthdate _____ SSN _____ Email _____

Are you a US citizen? Yes No

Date of Marriage _____ Existing Premarital Agreement? Yes No

Children (by Birth or Adoption)

Name	Birthdate	Child of:
_____	_____	<input type="checkbox"/> Joint <input type="checkbox"/> Client _____
_____	_____	<input type="checkbox"/> Joint <input type="checkbox"/> Client _____
_____	_____	<input type="checkbox"/> Joint <input type="checkbox"/> Client _____
_____	_____	<input type="checkbox"/> Joint <input type="checkbox"/> Client _____
_____	_____	<input type="checkbox"/> Joint <input type="checkbox"/> Client _____
_____	_____	<input type="checkbox"/> Joint <input type="checkbox"/> Client _____

Does any child have special educational, medical or physical needs, or receive governmental benefits? Yes No

Other Beneficiaries (Individuals or Charities)

Name	Relation (if applicable)
_____	_____
_____	_____
_____	_____
_____	_____

Advisors

Accountant _____ Phone _____

Financial Advisor _____ Phone _____

Other Advisor _____ Phone _____

Referred to Our Firm By _____

Part 2 – Property

Please give your best estimates of all values. Please use another sheet of paper to continue any lists.

To identify the Owner, use “JT” for joint ownership; “C1” for Client 1 as sole owner; or “C2” for Client 2 as sole owner.

Real Estate. *For any real estate outside of South Carolina, please identify where such real estate is located.*

	Description	Owner	Market Value	Debt
Real Estate	1. Personal Residence			
	2.			
	3.			
	4.			
	5.			
	6.			

Bank and Savings Accounts. *Do not include Retirement Accounts or Annuities.*

	Financial Institution	Owner	Market Value	Type of Account
Bank and Savings Accounts	1.			
	2.			
	3.			
	4.			
	5.			
	6.			

Stocks, Bonds, or Investment Accounts. *Do not include Retirement Accounts or Annuities.*

	Stock, Bond or Investment Account	Owner	Market Value	Type of Account
Stocks, Bonds, or Investment Accounts	1.			
	2.			
	3.			
	4.			
	5.			
	6.			

Retirement Accounts. Please identify the type of account (e.g., IRA, Roth IRA, SEP, SIMPLE, 401(k), 403(b), Profit Sharing).

	Custodial Institution	Owner	Market Value	Type of Plan
Retirement Accounts	1.			
	2.			
	3.			
	4.			
	5.			
	6.			

Life Insurance Policies and Annuities. Please use "T" for term insurance, "CV" for cash value insurance, "A" for annuities.

	Insurance Company	Type	Owner	Insured	Cash Value	Death Benefit
Life Insurance/ Annuities	1.					
	2.					
	3.					
	4.					
	5.					
	6.					

Other Property. List other property that does not fit into any other listed category (e.g., closely-held business, money owed to you)

	Description	Owner	Market Value
Other Property	1.		
	2.		
	3.		
	4.		

Annual Income

	Description	Client 1	Client 2
Annual Income	1. Employment		
	2. Pension		
	3. Social Security		
	4.		

