

ESTATE PLANNING QUESTIONNAIRE

I. FAMILY INFORMATION

Full Name: _____

Address: _____

Telephone Number at Work: _____ Home: _____

Cell: _____ Email: _____

Birthdate: _____ Birthplace: _____

Are you a U.S. citizen? Yes: ___ No: ___

If U.S. citizen other than by birth, state date of citizenship: _____

Occupation: _____

Employer: _____

Social Security # _____

Driver's license number: _____

Did anyone refer you to us? Yes No If yes, whom may we thank?

Do you want the referral source to be copied on correspondence? Yes No

Do you want to include future children in your estate plan? Yes No

Do you wish to be cremated? Yes No

Names and Dates of Birth of Children born to, or adopted by, you:

Children	Who is the Parent?	Age of Child	Gender	Grandchildren?
Name: _____ Address: _____ Phone: _____				
Name: _____ Address: _____ Phone: _____				
Name: _____ Address: _____ Phone: _____				
Name: _____ Address: _____ Phone: _____				
Name: _____ Address: _____ Phone: _____				

II. ASSET INFORMATION: (Approximate Current Values)

1

Bank Accounts _____
Marketable Stocks and Bonds _____
Closely-Held Business² _____
Real Estate-Home _____
Real Estate-Other _____
Tangible Personal Property _____
Life Insurance³ _____
Pension, Profit Sharing or IRAs _____
Expectancies _____
Potential inheritance _____
Vehicles _____
Other Assets _____
(use back if necessary) _____

- 1 If joint ownership with other than spouse, please indicate other joint owner(s)
- 2 Provide value of interest and percent of business owned
- 3 Provide beneficiary if other than spouse and owner if other than insured

III. LIABILITY INFORMATION: (Approximate Current Value)

1

Mortgages _____
Loans _____
Notes _____
Other Debts _____
(use back if necessary) _____

IV. WILL INFORMATION:

PERSONAL REPRESENTATIVE, TRUSTEE, GUARDIAN

Personal Representative: Name people, in order of priority, to serve as your Personal Representative: (A married person usually appoints his or her spouse first).

(Personal Representative)

Name	Relation

Guardian for Minor Children: A Guardian/Conservator is only needed when both parents are deceased as the natural parent of a minor is the natural guardian without Court order. An adoptive parent is considered a natural parent, but a stepparent is not a parent unless a formal adoption has been completed. If there is no natural guardian, a Court will appoint a legal guardian for a minor child, based upon the best interests of the child. Your selection of a guardian, while not controlling, will be given consideration by the Court. If you have minor children (under age 18), name two people, in order of priority, other than your spouse, to serve as Guardian/Conservator. You can also name married couples as Co-Guardians/Conservators).

1. _____
2. _____

Do you wish to give specific property, real or personal, to anyone?

 Yes No

If yes, please name the beneficiary and the specific property you wish to give (use back if necessary):

Name of Beneficiary	Property Description
_____	_____
_____	_____
_____	_____
_____	_____

Do you wish to give a specific amount of cash to any individual, organization or charity?

_____ _____
Yes No

If yes, please name the beneficiary and amount of cash:

Name of Beneficiary	Amount of Cash
_____	_____
_____	_____
_____	_____
_____	_____

The general preferred disposition is to leave all assets to the surviving spouse, or if no surviving spouse, to the children, equally. This arrangement may not be suitable in certain situations. (For example: children with special needs, children of prior marriages, tax considerations, etc.) Florida law allows children to be disinherited. If you prefer a disposition to your spouse, then to your children equally, please check here . If you prefer another disposition or are not sure, please state below what you would like your plan to include:

If your spouse predeceases you and you have children who survive you, do you want the residue of your estate to be divided equally among your children?

_____ _____
Yes No

If no, please specify the unequal shares.

In the event that you, your spouse and children perish in a common disaster, it is advisable to designate contingent beneficiaries. A common method is to distribute ½ to your family and ½ to your spouse's family to avoid inheritance based upon the order of death. If this is satisfactory, check here . If you prefer another distribution, please state:

Name of Beneficiary	Percentage
_____	_____
_____	_____
_____	_____
_____	_____

Do you want any share left to a child who predeceases you to go to his or her children in equal shares (your grandchildren)?

Yes No

Please specify the age at which a child or grandchild should receive his or her share of your estate (Age 25 is the minimum we recommend, but it is entirely your choice): _____.

At what age or ages, or event (if any) would you like a partial lump-sum distribution made to your beneficiary? (For example: ½ at age 30, ½ at age 35).

Trustee: The Trustee administers the assets under a Trust (whether the Trust is a living trust or one contained in a will) until the beneficiaries of a Trust reach a specific age. Whom do you want to designate as Trustee? Please specify two people, in order of priority, other than your spouse, to serve as Trustee of the trust:

(Trustee)

Name	Relation
1.	
2.	
3.	
4.	

The Trustee may have discretion to decide how much money to distribute for the general welfare or benefit of your beneficiary, unless you specify a mandatory payment or use for specific purpose only. If you want full discretion by the Trustee, check here . If you prefer other than complete discretion please specify.

If you have no children or grandchildren surviving you, please state how you would like the residue of your estate to be distributed (please indicate names of beneficiaries and percentage to be received by each beneficiary).

Do you have any special needs or concerns you would like to address in your Will? If so, please explain.

DURABLE POWER OF ATTORNEY:

A durable power of attorney is a document which allows a person to name another to act for them. The “durable” nature of the document means that so long as certain legal formalities are satisfied, even if a person become incapacitated as defined by law, the person named in the power can still act for a person when they are unable to act for themselves. If you would like to execute a Durable General Power of Attorney appointing one or more people as your attorney-in-fact to handle your financial affairs if you are unavailable or unable to act, please indicate the names, addresses and telephone numbers of your primary attorney-in-fact and one alternate.

Agent(s)

Name: _____ Relation: _____	Address: _____ Phone: _____
Name: _____ Relation: _____	Address: _____ Phone: _____
Name: _____ Relation: _____	Address: _____ Phone: _____

HEALTH CARE SURROGATE DESIGNATION

Florida law allows for powers of attorney to include the right for a person to make decisions regarding a person’s healthcare. This document is referred to as a health care surrogate designation. The Health Care Surrogate is given the right to make medical decisions. This is very important when dealing with someone who is not married or when a spouse is not available to provide consent. Please indicate the names, addresses and telephone numbers of your primary attorney-in-fact and one alternate.

Surrogate(s)

Name: _____ Relation: _____	Address: _____ Phone: _____
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Name: _____ Relation: _____	Address: _____ _____ Phone: _____
Name: _____ Relation: _____	Address: _____ _____ Phone: _____

LIVING WILL:

This document allows a person, when they are on their “death bed” to state they do not wish to have life prolonging procedures (i.e., tubes and ventilators) utilized when death is imminent. This is a right to die document. If you wish to have a Living Will, please indicate the names, addresses and telephone numbers of your primary health care representative and one alternate.

Designation of Pre-Need Guardian:

This document allows someone to name a person to serve as their court appointed guardian should they ever need one. The Court strongly considers this when appointing a guardian.

Designated Pre-Need Guardian(s)

Name: _____ Relation: _____	Address: _____ _____ Phone: _____
Name: _____ Relation: _____	Address: _____ _____ Phone: _____
Name: _____	Address: _____

Relation: _____	_____ Phone: _____
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If you have any questions when completing this form, please contact Katherine B. Schnauss Naugle at (904) 366-2703. The completed form should be returned to Katherine B. Schnauss Naugle, 810 Margaret Street, Jacksonville, FL 32204.