



Civic Center Building, Third Floor  
1700 Hudson Street  
PO Box 1549  
Longview, WA 98632

Phone: (360) 423-5220  
Fax: (360) 423-1478  
Website: www.walstead.com

**ESTATE PLANNING QUESTIONNAIRE**  
**(Single Person)**

1. Name \_\_\_\_\_ U.S. Citizen? Yes No

2. Address \_\_\_\_\_  
Street City State Zip

Phone (home) \_\_\_\_\_ (work) \_\_\_\_\_ (cell) \_\_\_\_\_

3. Birthdate \_\_\_\_\_ Social Security Number \_\_\_\_\_

4. Have you been married before? Yes No

If Yes, list : Date married \_\_\_\_\_ Date separated/divorced \_\_\_\_\_

Are there any special restrictions/conditions from the prior marriage? (Examples: support, requirement to name ex-spouse or children as beneficiaries of life insurance policies, etc.)?

Yes No Unknown

If Yes, briefly state what those requirements are: \_\_\_\_\_

\_\_\_\_\_

How long have you resided in Washington? \_\_\_\_\_

Where else have you lived (states/countries only) \_\_\_\_\_

\_\_\_\_\_

5. Do you have children? Yes No If Yes, list the following:

Name

Date of Birth

City/State of Residence

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If any of these children are adopted, place an "A" beside the child's name.

Do you have any deceased children?  Yes  No If Yes, provide the following:  
 Name of child \_\_\_\_\_ Date of death \_\_\_\_\_  
 Name of child \_\_\_\_\_ Date of death \_\_\_\_\_

Children of deceased child, if applicable:

<u>Name</u>	<u>Date of Birth</u>	<u>City/State of Residence</u>
_____	_____	_____
_____	_____	_____

6. Why are you writing a Will? (Check all those that apply)
- |  |   |
|--|---|
| <input type="checkbox"/> Never had one   | <input type="checkbox"/> Want to disinherit someone                   |
| <input type="checkbox"/> Contemplating marriage/divorce                                      | <input type="checkbox"/> Concerned about probate                      |
| <input type="checkbox"/> Have child(ren) especially concerned about or who has special needs | <input type="checkbox"/> Want to make gift to specific person/charity |
| <input type="checkbox"/> Other (please provide): _____                                       |   |

7. In general terms, how do you want your property to be distributed on your death? (Don't worry about exact detail; we'll review this when you come in)

\_\_\_\_\_

\_\_\_\_\_

8. Who do you want to be your executor?

Name: \_\_\_\_\_ City, State: \_\_\_\_\_

Alternate? Name: \_\_\_\_\_ City, State: \_\_\_\_\_

9. If you have minor children, how old should they be to inherit? (The law presumes age 18.) \_\_\_\_\_

10. What do you own?

**REAL ESTATE**

a. Do you own the home in which you live?  Yes  No If Yes, state the following:

Fair Market Value (likely sale price): \$ \_\_\_\_\_

Total of mortgages on property: \$ \_\_\_\_\_

Whose name is on the title? \_\_\_\_\_

b. Do you own any other real estate?  Yes  No If Yes, list the following:

<u>Address</u> <u>(or other description)</u>	<u>Fair</u> <u>Market Value</u>	<u>Debts on</u> <u>Property</u>	<u>Names on Title (H/W/Both/Other)</u>
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____

**BANK ACCOUNTS** (basic checking, passbook savings, and certificates of deposit):

**Checking accounts**

<u>Institution</u>	<u>Amount</u>	<u>Names on Account</u>
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

**Savings accounts**

<u>Institution</u>	<u>Amount</u>	<u>Names on Account</u>
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

**Certificates of Deposit**

<u>Institution</u>	<u>Amount</u>	<u>Names on Account</u>
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

**STOCKS/BONDS/MUTUAL FUNDS** (but NOT retirement accounts)

<u>Company</u>	<u>Current Value</u>	<u>Names on Shares/Bonds</u>
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

**LIFE INSURANCE** (personal, mortgage cancellation, employer-provided, etc.)

<u>Insurer</u>	<u>Death Benefit</u>	<u>Type of Insurance</u> <u>(Term/Whole Life)</u>	<u>Beneficiary</u>
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____
_____	\$ _____	_____	_____

**RETIREMENT ACCOUNTS** (401(k)s, IRAs, Roth IRAs, pensions)

<u>Type of Account</u>	<u>Amount</u>	<u>Beneficiary</u>
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

**VEHICLES** (cars, trucks, motor homes, boats, etc.)

<u>Make/Model/Year</u>	<u>Fair Market Value</u>	<u>Debt Owning</u>	<u>Names on Title (H/W/Both/Other)</u>
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____

**PERSONAL PROPERTY** (household furnishings, jewelry, antiques, guns)

For items that are worth more than \$3,000, describe:

Item \_\_\_\_\_ Estimated value \$ \_\_\_\_\_  
 Item \_\_\_\_\_ Estimated value \$ \_\_\_\_\_

**BUSINESS INTERESTS** (partnership/sole proprietorship/corporation)

Do you own an interest in a business?  Yes  No If Yes, list the following:

- a. Name of Business \_\_\_\_\_
- b. Your interest in business (i.e., sole owner, partner, etc.) \_\_\_\_\_
- c. Estimated Value: \$ \_\_\_\_\_

**MONEY OWED TO YOU** (promissory notes, land contracts, etc.) If others owe you money, state:

<u>Who owes you money</u>	<u>Amount owed</u>	<u>Describe written evidence of debt</u>
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

11. **OTHER DEBTS** - do you owe anyone else money not already listed above? If so, list:

<u>To Whom</u>	<u>How much</u>	<u>What kind of debt</u>
_____	\$ _____	_____
_____	\$ _____	_____

12. Do you have:

- Will?  Yes  No
- Trust?  Yes  No
- Durable Power of Attorney?  Yes  No
- Advance Directive/Living Will?  Yes  No
- Prenuptial/Post-Nuptial Agreement?  Yes  No

13. If you are anticipating an inheritance or gift in the next ten years, describe:

From Whom

Approximately how much

\_\_\_\_\_  
\_\_\_\_\_

\$ \_\_\_\_\_  
\$ \_\_\_\_\_

14. Have you made any large gifts (more than \$10,000 to one person in a year)? Yes No

15. Are you planning on moving from Washington? Yes No

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### FOR ATTORNEY'S USE ONLY

Documents to be prepared:

- Will
- Durable Power of Attorney
- Health Care Directive
- Letter to client
- Statement - fee to be charged: \$ \_\_\_\_\_