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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)
- Never had one Want to disinherit someone
 Contemplating marriage/divorce Concerned about probate
 Have child(ren) especially concerned about or who has special needs Want to make gift to specific person/charity
 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 (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 Owed</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

DISCLAIMER

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By submitting this form, you agree that no information disclosed by you shall prohibit WALSTEAD MERTSCHING PS or its individual attorneys from representing a different client in this matter.

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: \$ _____