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ESTATE PLANNING QUESTIONNAIRE DATED:

If single, please fill out "C1" (Client 1) areas.

If married, please use C1 for husband and C2 for wife.

When finished, click "Submit" button at end.

Personal Information

C1 Full Name:

C1 Legal/Sig Name:

C1 Other Names:

C1 Birth Date:

C1 Citizenship:

C1 Phone(s):

C1 Email:

C1 Occupation:

C2 Full Name:

C2 Legal/Sig Name:

C2 Other Names:

C2 Birth Date:

C2 Citizenship:

C2 Phone(s):

C2 Email:

C2 Occupation:

Marriage Date:

Home Fax:

Home Address:

Children of Current Marriage (full name, nickname, birthdate, address if living separately):

Deceased Children, if any:

C1 Prior Marriage? List details—ex-spouse, date of divorce/death, child info:

C2 Prior Marriage? List details—ex-spouse, date of divorce/death, child info:

Other Heirs/Dependents:

Special Needs, Disabilities?

GUARDIANS OF MINOR CHILDREN: Who would you choose to raise your children if you were unable?

Guardian Nominee (name, contact info):

Alternate Guardian Nominees:

DISABILITY TRUSTEES. If you ever become unable to effectively manage your property or financial affairs, who would you want to handle your financial affairs for you? (Name your spouse or partner or one or more persons or financial institutions, if you know. If you do not know, we will help you decide who would be most appropriate.)

C1 First Choice (name & contact info):

C1 Second Choice (name & contact info):

C1 Third Choice (name & contact info):

C2 First Choice (name & contact info):

C2 Second Choice (name & contact info):

C2 Third Choice (name & contact info):

MEDICAL DECISIONMAKERS. If you ever become unable to communicate your wishes to your doctor, who would you want to make medical decisions for you? (Name your spouse or partner or one or more persons, if you know. If you do not know, we will help you decide who would be most appropriate.)

C1 First Choice (name & contact info):

C1 Second Choice (name & contact info):

C1 Third Choice (name & contact info):

C2 First Choice (name & contact info):

C2 Second Choice (name & contact info):

C2 Third Choice (name & contact info):

C1 Disposition Preference: Burial Cremation

C2 Disposition Preference: Burial Cremation

EXECUTORS AND DEATH TRUSTEES. Upon your death, who would you want to carry out your will and trust instructions? (Name your spouse or partner or one or more persons or financial institutions, if you know. If you do not know, we will help you decide who would be most appropriate.)

C1 First Choice (name & contact info):

C1 Second Choice (name & contact info):

C1 Third Choice (name & contact info):

C2 First Choice (name & contact info):

C2 Second Choice (name & contact info):

C2 Third Choice (name & contact info):

Assets: IMPORTANT Estimate asset totals here (note whether Separate or Community Property), bring supporting documents (e.g., grant deed, owners' title policy) to design meeting.

C1 Life Ins Face Amt:

C2 Life Ins Face Amt:

Annuities (Death Benefit?):

Real Estate Value:

Mortgages You Owe:

Other Debt You Owe:

Cash Accounts:

Retirement Accounts:

Other Investment Accts:

Stock Options:

Debt Owed to You:

Business Interests (LLC, etc.):

Expected Inheritance:

Expected Lawsuit J/T:

Other Assets (incl signif personal effects, cars, boats, planes, etc):

[NB: Check the website of any state controller that might be holding on to property of yours (California: <http://scoweb.sco.ca.gov/UCP/>, other states: <http://unclaimed.org/>) - the state may owe you hundreds or even thousands of dollars; checking this is simple, easy, quick—do it now.]

Advisors (Accounting, Financial, Legal)

We rely heavily on your other advisors to provide options for the best possible planning and to carry out the strategies you choose.

Advisor Contacts:

Design Meeting Preference (visit <http://sacredhonor.us> to pay the design meeting fee, which will be credited against flat fee quoted for the entire estate plan—for simple plans this may be the only fee):

Preferred Date/Time:

Alternate Date/Time:

(OPTIONAL: attend the FREE seminar at our office—“Family Protection Clinic”—learn about 36 common estate planning mistakes plus a few other things and have a great time! Sign up at <http://GUNLAW.PRO>)

Existing Documents (check each that applies to you and bring to meeting):

- Current Estate Plan Documents
- Divorce Papers
- Current Spousal Property Agreement
- Gift Tax Returns
- Estate Tax Return (e.g., widow)

Interested in discussing incentive planning (check each that applies; see www.guncounsel.com):

- Conventional Estate Planning
- Multi-Generational Firearms Training
- Financial Mentorship
- Career Preparation
- Career Maintenance
- Family Maintenance
- Fostering Religious Faith
- Charitable Enterprise
- Punishing Certain Behavior
- Other Incentive Planning

Briefly state here (or email) your desired distribution scheme, specific design meeting goals: