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NEW CLIENT ESTATE PLANNING QUESTIONNAIRE - INDIVIDUAL

Date: _____

Paid: _____

Balance: _____

THE INFORMATION IN THIS DOCUMENT IS SUBJECT TO THE ATTORNEY-CLIENT PRIVILEGE, AS PROVIDED IN THE TEXAS RULES OF EVIDENCE. THE CONTENTS OF THIS DOCUMENT ARE CONFIDENTIAL AND WILL NOT TO BE DISCLOSED TO THIRD PERSONS OTHER THAN IN FURTHERANCE OF PROFESSIONAL LEGAL SERVICES.

PLEASE COMPLETE THE FOLLOWING.

List all names as you wish them to appear in your legal documents.

CLIENT

Name: _____ Mobile Phone: _____
Address: _____ Home Phone: _____
Date of Birth: _____
E-mail: _____ Social Security #: _____
Employer: _____ Driver's License #: _____
Position/Title: _____ U.S. Citizen? Yes No

MARITAL HISTORY

List Marriages (name of spouse, date of marriage/divorce/death).

_____ Divorce Death Date of Divorce or Death: _____
_____ Divorce Death Date of Divorce or Death: _____
_____ Divorce Death Date of Divorce or Death: _____
_____ Divorce Death Date of Divorce or Death: _____

Do you have a Last Will and Testament? Yes No
Do you have a Trust or are you the beneficiary of a Trust? Yes No
Have you made any gifts in excess of \$15,000.00 to any individual during any one calendar year? Yes No
Have you ever filed a Gift Tax return (Form 709)? Yes No

CHILDREN

List all children, living or deceased; list their names as you wish them to appear in legal documents. If you wish to exclude a child, please make an appropriate indication.

Full Name Date of Birth Age Address

Have you adopted any children? Yes No
Have you treated any non-biological children as your own? Yes No
Do any of the children have special needs or receive government benefits? Yes No

Explain: _____

For Attorney Use:

Will POA MPOA ADHC DG
Trust MPOA ADHC DG
LLC ADHC DG
Other DG
Drafts e-mailed/mailed: _____
Closing Appointment: _____

YOUR ESTATE

Describe to whom you wish your Estate to pass upon your death, including any specific gifts.

Do any of the Beneficiaries have special needs or receive government benefits? Yes No

Explain: _____

CHARITABLE BEQUESTS

Describe any charitable bequests you wish to make, including any specific bequests to charity.

BURIAL AND CREMATION INSTRUCTIONS BEQUESTS

If you wish to include burial or cremation instructions in your estate planning documents, please describe such burial or cremation instructions below.

DESIGNATION OF GUARDIAN FOR MINORS

If you have a child under the age of 18 and wish to designate a person or persons to serve as guardian for such child, please identify the person or persons below, including their name, address, and telephone number.

Name:	Address:	Telephone:
_____	_____	_____
_____	_____	_____
_____	_____	_____

EXECUTORS AND TRUSTEES

	Executors: ¹	Address:	Telephone #
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

	Trustees: ²	Address:	Telephone #
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

Have any of the named Executors or Trustees been convicted of a felony? Yes No
Should Executor be paid? Yes No
Should Trustees be paid? Yes No

POWERS OF ATTORNEY

Please identify the individuals that you wish to serve as your agents below.

	Name:	Address:
1 st Agent:	_____	_____
2 nd Agent:	_____	_____
3 rd Agent:	_____	_____

DURABLE POWER OF ATTORNEY

	Name:	Address:
1 st Agent:	_____	_____
2 nd Agent:	_____	_____
3 rd Agent:	_____	_____

PROFESSIONAL ADVISORS

Please identify your professional advisors

Accountant: _____
Insurance Agent: _____
Financial Advisor: _____

¹ The Executor is the person that is responsible for gathering your assets upon your death, satisfying debts of the Estate, and distributing the Estate to the beneficiaries named in your Will.
² The Trustee will manage any Trusts and assets held by such Trusts.

ASSETS

Estimated Net Worth:	\$	_____
Estimated Total Value of Community Property:	\$	_____
Estimated Total Value of Husband's Separate Property:	\$	_____
Estimated Total Value of Wife's Separate Property:	\$	_____

Does the total value of your Estate exceed \$11,580,000.00? Yes No

REAL ESTATE

For all Real Estate (Land/houses, etc., identify the Location/Address (include County of location).

Address:	Equity:	Value:
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

OIL, GAS, AND MINERAL INTERESTS

For all oil, gas, and minerals that you own, identify the county in which such minerals are located.

BANKS AND BROKERAGE ACCOUNTS

Identify all Institutions at which you maintain an account.

Name of Bank/Brokerage Firm	Acct #	Beneficiary Designations	Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

OTHER ASSETS (Business interests, Retirement Accounts, Digital Assests such as bitcoin, Trademarks, Patents, Copyrights, etc.)

Have you created a list or database of your automatic draft payments? Yes No

Have you created a list or database of your passwords for digital accounts? Yes No

Have you left any written instructions for your family upon your passing? Yes No