

ESTATE PLANNING QUESTIONNAIRE

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903.944.7800

Date:

Legal Name:

Address:

County of Residence:

Email Address:

Telephone:

Date of Birth:

US Citizen?

Spouse's Legal Name:

Email Address:

Telephone:

Date of Birth:

US Citizen?

Family Information

List all of your living children.

Legal Name

Age

Address

List all deceased children.

Legal Name(s)

Have you adopted any children?

Have you treated any non-biological children as your own?

Do any of your children have special needs or receive government benefits?

If yes, please provide a brief explanation.

Have you or do you expect to inherit any property?

Do you have any frozen genetic material in storage?

Estate Assets

Real Estate & Mineral Interests

For each tract of real property (including minerals), list the address, and county (and state if outside of Texas).

Address

County

Cash/Savings

For each account, list the bank name, the beneficiaries (if any), and estimated value.

Institution Name

Beneficiaries

Value

Stocks, Bonds, Mutual Funds (excluding those held in retirement accounts)
For each account, list the institution name, the beneficiaries, and estimated value.

Institution Name	Beneficiaries	Value
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Retirement Accounts, 401(k), Pension plans, Annuities, IRAs
For each account, list the institution name, the beneficiaries, and estimated value.

Institution Name	Beneficiaries	Value
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Business Interests

For each business, list the legal name, ownership, and value.

Business Name	Ownership Interest	Value
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Life Insurance

For each policy, list the beneficiaries, and estimated cash value.

Institution Name	Beneficiaries	Cash Value
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Digital Assets (cryptocurrency, bitcoin, NFTs, etc.)
Describe generally and include estimated value.

Description	Beneficiaries	Value
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Estimated total value of your estate

\$ _____

YES NO

Do you own any separate property?

Distribution of your estate

At our meeting be prepared to discuss how your estate should be distributed upon your death, keeping in mind any contingent beneficiaries if a primary beneficiary does not survive you.

Describe the distribution of your assets upon your death, including any specific gifts to individuals or charity.

Burial and Cremation Instructions

If you wish to include (1) burial or cremation instructions or (2) rights to the disposition of your remains, describe such instructions below.

Fiduciaries (Executors, Trustees, Agents)

List the name, address, and telephone number of each person (or bank/trust company) that will serve in the fiduciary capacity indicated. Please list alternates at least 2 alternates for each.

Executor – The individual that will probate your Will.

Name	Address	Telephone
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Trustee – The individual (or institution) that will manage your Trust (Note, you may not have a trust depending on your specific estate plan).

Name	Address	Telephone
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Agents (Power of Attorney) – The individual(s) that will make decisions for you during your lifetime, if you are unable to make decisions for yourself.

Name	Address	Financial	Medical
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Should Executors be paid?

Should Trustees be paid?

Should Agents (power of attorney) be paid?

Do you have a premarital agreement?

Have you made any gifts of more than \$19,000.00 during any calendar year?

Have you ever filed a Gift Tax return (Form 709)?

Are you subject to an ongoing obligation to a former spouse
(child support, etc.)?

Are you the creator or beneficiary of a trust?

Are you a current party or potential party to a lawsuit?

Have you created a list or database of your automatic draft payments?

Have you created a list or database of your passwords for digital accounts?

Have you left any written instructions for your family upon your passing?