



QUESTIONNAIRE

Estate Planning Fact Finder

Key question

Can you successfully transfer the assets you have worked a lifetime to accumulate?

Personal information

Marital status: Single Married

Number of children: _____ Any children from a previous marriage? Yes No

Approximate net worth: _____

Is it important that your children maintain some connection to the operation? Yes No

Business

To whom do you want to transition the business?

Unrelated third party

Key employee

Not sure

Family member – child or other

No one. I will wind down the business

Other: _____

When do you want to transition out of the operation?

During lifetime At what age? _____

At death

Not sure

How do you want to transition?

Sell

Bonus

Gift

Other: _____

Please provide a list of assets or a balance sheet.

Upon the first death

Survivor needs (if married)

Fiduciaries or people who will help

Who do you trust for financial matters? For health care concerns?

It is best to name a couple of people to help you with these issues. Try to name your top three:

Surviving spouse or partner

Please check all that are concerns:

- Income replacement Remarriage protection Creditor protection

Do you want amounts going to the surviving spouse protected or given outright?

- I want to protect and specify how my assets are distributed.
 I want all my assets to go directly to my spouse.

Descendants

Are any assets going to descendants upon the first death? _____% or \$_____

Which descendants? _____

Is estate equalization a concern? Yes No

Community

Are there any amounts going to your community upon the first death? _____% or \$_____

Which organizations? _____

After you are both gone

Descendants

Total amounts going to your descendants: _____% or \$_____

Do you want amounts going to your descendants protected, structured distributions or given outright?

Check one:

- I want to protect and specify how assets are distributed to my descendants and how they may be used.
 I want assets to be distributed according to a specific schedule.
 I want assets to go directly to my descendants.
 Other (please share you vision for how your estate will distribute):

Please check all that are concerns:

- Spending protection (such as preventing descendants from spending assets too quickly)
- Special needs (financial or medical; may include guidance for care and use of assets)
- Divorce protection (such as protecting assets for your descendants)
- Blended family concerns (such as plans to help ensure descendants are treated equitably)
- Creditor protection (strategies for placing assets beyond the reach of future creditors)

Community

Amounts going to your charity _____% or \$_____

Which organizations?

_____	_____
_____	_____
_____	_____
_____	_____



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