

BLEVINS LAW

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ESTATE PLANNING QUESTIONNAIRE

This form is intended to provoke thought and conversation during the estate planning process. You are not required to complete it. An attorney will gladly meet with you at any time during the planning process. However, you may wish to use it as a planning tool as you prepare for your meeting. Please call us at 859-985-5410 when you are ready to schedule an appointment.

As a reminder, a Will is not a legally binding document until after your death. It can be changed from time to time as children age, guardian/trustee selections change, etc. So, consider your current circumstances as you think through it and know that you can make changes as life evolves.

Finalizing a will is a gift you give to those who will handle your estate. Thank you for trusting us to assist you with such an import gift to those who will handle your estate.

1. Please bring copies of any **current Will or Trust** you may have drafted, established or created or which has been established for you.
2. Please provide **basic personal information** with the correct and formal spelling of your names.

Legal Name	Birthplace	Date of Birth	
Street Address	City	State	Zip Code
Daytime Phone	Email		

3. Please select **an Executor** and an alternate Executor to carry out the terms of your Will. The Executor is the person responsible to the Court and your heirs to properly dispense and distribute your estate in accordance with your Will.
 - a. Executor: _____
 - Alternate: _____

Questions 4-5 purposefully deleted if no minor children.

6. **Who shall receive your property under the Will?**

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All property to: _____

If not surviving, then to _____

7. SPECIAL GIFTS: Describe in detail any gifts of specific items (ex. jewelry, antiques) including whether you wish to discuss *charitable giving plan* to non-profit, church, foundations, community, etc.

To Whom	Relationship	Address	Item or Amount

8. ASSETS: You should review the ownership of your assets to determine the current status of ownership and your preference for whether the title is held **jointly or individually. The attorney will discuss the effect of each of these on your estate. Please bring copies of any items you wish for attorney to review. The following list is an example of assets*:**

- a) Real Estate (bring Deeds to attorney meeting)
- b) Automobiles (bring car titles to attorney meeting)
- c) Stocks
- d) Bonds
- e) Bank Accounts
- f) CD's
- g) Savings Accounts
- h) Value in other Estates or Trusts or Future Inheritance
- i) 401K
- j) IRA
- k) Collections or Antiques
- l) Other items to bring to attorney's attention: _____

***The ownership of these items may be controlled outside of the Will. Beneficiary designations, payable on death clauses, etc., control over the Will.**

9. MISCELLANEOUS: The following circumstances may affect your estate. If any of these items apply to you, please circle "Yes" so that you can ask the attorney to review your circumstances.

- a. **LIFE INSURANCE:** Life Insurance policy beneficiary designations should be reviewed as part of your estate plan. Please confirm that those beneficiaries meet your desires. Additionally, these may need to be changed if trusts are created for minor children. Please advise attorney if you wish for them to discuss this with you.
- b. **GIFTS:** Have you ever filed a Gift Tax Return? Yes No
Do you ever make a gift of greater than \$12,000 to any one individual in any one year? Yes No
- c. **TRUSTS:** Have you ever created a Trust? Yes No Supply copies if so.

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- d. Do you have a power of appointment in any Trust? Yes No
 - e. **TAX PLANNING:** Do expect a substantial inheritance? Yes No
If so, we may wish to plan a meeting with an estate tax planning specialist.
 - f. Do you have any pension or employee benefits for which you are eligible? Yes No
 - g. **BUSINESS ASSETS:** Are you a member of a partnership or self-employed? Do you own stock in a closely-held corporation? Yes No
 - h. **MARITAL OBLIGATIONS:** Do you have any continuing obligations under a divorce decree? Yes No
If so, please bring copy of the Property Settlement Agreement or Court Order.
Do you have a **Pre-nuptial or Post-nuptial Agreement?** Yes No
 - i. **CITIZENSHIP:** Are you a U.S. Citizen? Yes No
 - j. **DOMICILE:** Do you spend a nominal amount of time each year in any other state?
Yes: _____ No
 - k. **INTENTIONAL OMISSION:** Are there other known family members that you will intentionally omit from your Will? Yes No
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10. OTHER INFORMATION. Please use this space to provide any other information, questions, special wishes or desires for your Estate that we need to discuss including any directives regarding funeral services or cremation.

11. Do you have a Power of Attorney appointing another person to act on your behalf?

Yes, I already have one. I do not need advice in this area. Bring copy.

Yes, I already have one but I'd like an Attorney to review it at this time.

No, please prepare one for me.

I select the following persons to be my Attorney(s)-in-Fact: _____

Alternate: _____

No, I need to discuss this with the Attorney to gain a better understanding of whether I want to grant power to another person.

12. Do you have a Living Will or Health Care Power of Attorney?

Yes, I already have one. I need do not need advice in this area. Bring Copy.

Yes, I already have one but I'd like an Attorney to review it at this time.

No, please prepare one for me so that someone can make health care decisions for me if I cannot act for myself.

I select the following persons to be my Attorney(s)-in-Fact: _____

Alternate: _____

No, I need to discuss this with the Attorney to understand if I wish to execute any medical or health care documents.

13. Funeral: If you want someone other than your immediate family to plan your funeral, please indicate that here: _____

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** Please bring a copy of any existing Power of Attorney that you would like for the attorney to review as part of your estate plan.

WE LOOK FORWARD TO MEETING WITH YOU SOON!