SPEIDEL BENTSEN LLP CONFIDENTIAL INDIVIDUAL ESTATE PLANNING QUESTIONNAIRE To

Today's Dat	е.	
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Personal Information				
Full name:				
Home address:				
Second home address:				
Home/cell telephone:				
Email address:				
Correspond by (select one):	☐ Email	☐ U.S. Mail		
Birthdate:	2			
Citizenship:				
Employer:				
Office telephone:				
Safety Deposit Box Location:				
Person with access:				
Dates of Military Service:				
Rank & Serial No.:				
Do you desire Asset Protection Planning?	☐ Yes ☐ No	Do you have an Postnuptial Agre		☐ Yes ☐ No
Do you have any Prior Marriages or Prior Registered Domestic Partnerships?	☐ Yes ☐ No	Do you have an prior relationshi	y children from a o?	☐ Yes ☐ No
If yes, how ended:	☐ Death ☐ Divorce			
Name of prior spouse/partner (if any):				
Fiduciary	First Choice		Alternate/Succes	ssor
Executor:				10000000000000000000000000000000000000
Trustee:				
Guardian:				
Power of Attorney-Financial:				
Power of Attorney-Health Care:				

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Full Name	<u>Sex</u>	<u>Birthdate</u>	City of I	Residence	Married?	Number of Children
1.	☐ Male ☐ Female				☐ Yes ☐ No	
2.	☐ Male ☐ Female				☐ Yes	
3.	☐ Male☐ Female				☐ Yes	
4.	☐ Male ☐ Female	()**):			☐ Yes	
5.	 ☐ Male ☐ Female		-		Yes	
6.	☐ Male☐ Female	(☐ Yes☐ No	
Note: If you have minor c	hildren vou will need	to nominate a d	uardian and	a trustee for	 any trust for th	e children
, toto. Il you mave illinor o		io nonimato a g	, a a raira r	a tractice for	any traction th	o omarom.
Deceased Children				Data of		Number of
<u>Full Name</u>	<u>Sex</u>	<u>Birthda</u>	<u>te</u>	<u>Date of</u> <u>Death</u>	Married?	Number of Children
1.	☐ Male ☐ Female				☐ Yes ☐ No	
2.	☐ Male ☐ Female			2000	☐ Yes ☐ No	
Grandchildren						
Full Name	<u>Sex</u>	<u>Birthdate</u>	Child of		City of Residence	Married?
1.	☐ Male ☐ Female				, , , , , , , , , , , , , , , , , , , 	☐ Yes ☐ No
2.	 ☐ Male ☐ Female		-			
3.	☐ Male ☐ Female	()		***		Yes
4.	☐ Male ☐ Female	()	1.		TOTAL TOTAL STATE OF THE STATE OF	Yes
5.	☐ Male ☐ Female			-		□ No
6.	☐ Male	-	S			☐ Yes
	☐ Female		×			□ No □ Yes
2000200000000000000000000000000000000	☐ Male					
78.	☐ Male☐ Female☐ Male☐ Female☐ Male☐ Female☐ Female				-	No Yes

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Life Insurance Company name and policy number: Face amount: Loans outstanding: Present cash value: Primary beneficiary(ies): Contingent beneficiary(ies): Please attach separate page if necessary. **Retirement Benefits** IRA: Approximate balances: Primary beneficiary(ies): Contingent beneficiary(ies): Please attach separate page if necessary. **Employer Plans:** Name of Employer Type (pension, profit sharing, ESOP, 401(k), etc.) Approximate balance: Primary beneficiary(ies): Contingent beneficiary(ies): Please attach separate page if necessary. Monthly Income (Net of any withholding) Employment Social Security Pension Bank interest

Page 4 Stock Dividends Bond interest Disability income Total monthly income **Annuities** Company name and policy number: Face amount: Loans outstanding: Present cash value: Primary beneficiary(ies): Contingent beneficiary(ies): Please attach separate page if necessary. Family business, Partnerships, LLCs, Closely held securities Company name and policy number: Face amount: Loans outstanding: Present cash value: Primary beneficiary(ies): Contingent beneficiary(ies):

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Estate Planning Questionnaire

Please attach separate page if necessary.

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ASSETS AND LIABILITIES

A.	Assets – Current Fair Market Values	
	Cash (checking and savings accounts)	\$
	Short-term investments (treasury bills, certificates of deposit, etc.)	\$
	Brokerage accounts - Publicly traded stocks and bonds	\$
	Principal residence	\$
	Vacation home	\$
	Other real estate	\$
	Total Family business, Partnerships, LLCs	\$
	Accounts receivable – promissory notes payable to you	\$
	Total face amount of life insurance	\$
	Total Annuities	\$
	Total retirement benefits	\$
	Total qualified plans and IRAs	\$
	Total non-qualified plans	\$
	Furnishings (including art and antiques)	\$
	Automobiles	\$
	Boats	\$
	Other (specify)	\$
	TOTAL ASSETS	\$
B.	<u>Liabilities</u>	
	Mortgage(s)	\$
	Credit Card Debt	\$
	Loans – promissory notes payable by you	\$
	Other obligations	\$
	TOTAL LIABILITIES	\$
NET	WODTH ASSETS MINITS LIABILITIES	