

ZEIGLER & ASSOCIATES, PC

ESTATE PLANNING QUESTIONNAIRE

INFORMATION AND DOCUMENTS REQUESTED FOR INITIAL MEETING

A. DOCUMENTS

1. All deeds for all real estate with addresses for each property owned.
2. All tax bills for all real estate.
3. All land contracts and/or mortgages held.
4. All accounts receivable (people, children who owe you money).
5. All investment account statements: US savings bonds, stocks, bonds, mutual funds, etc.
6. All leases: auto, equipment, real estate.
7. All bank accounts (checking, savings, certificates of deposit, etc.).
8. All life insurance and annuity information.
9. All retirement plan information.
10. All Wills and Trusts.
11. Tax returns - most recent: • For individuals - Form 1040; • For businesses - Form 1120
12. Divorce Judgment, if relevant.

B. PLAN FOR DISTRIBUTION

_____ Children – equally/unequally: _____
_____ Other beneficiaries: _____
_____ Special bequests/charitable gifts: _____

C. NAME PERSONS TO HANDLE YOUR AFFAIRS

1. If you have minor children, name:

Guardian (care decisions): _____
Conservator (financial decisions): _____
(The Conservator could be same person as Guardian .)

2. Your Will - you need to name a Personal Representative and Alternate Personal Representative:

#1 _____ #2 _____

3. Your Trust - You need to name a Successor Trustee and Alternate Successor Trustee:

#1 _____ #2 _____

This means that upon the death, incompetency, resignation or removal of any trustee, the successor trustee you have named will be appointed.

4. Your Patient Advocate - You need to name a Patient Advocate and Successor Patient Advocate:

#1 _____ #2 _____

This is allows someone else to carry out your wishes for your health care.

5. Your General Durable Power of Attorney – You need to name a Successor Agent and Alternate Successor Agent:

#1 _____ #2 _____

This is a legal document which allows your chosen Agent to handle your financial affairs while you are disabled.

6. Your Funeral Representative Designation – Your Agents to handle your funeral arrangements:

#1 _____ #2 _____

Finally, the Personal Representative, Successor Trustee, Agent and Patient Advocate may be the same person if you choose. The person or persons you name should be someone you trust completely. Usually, an individual will name a spouse or child.