

Estate planning questionnaire

GENERAL INFORMATION

NOTE: Please do not omit any individuals that the questions ask for if they have since died. If any individual listed has since passed away, please indicate by marking (deceased) next to the name.

1. Please list your name and the name of your spouse (if applicable):

2. Please list your birth date and the birth date of your spouse:

3. Please list your address and contact information

4. Have you ever been married to another person besides your current spouse (if applicable)?
5. Have you ever been married to a person to whom you are not currently married (i.e. divorced, widowed, etc)? If so please list their names.
6. Did you have any children with your former spouse(s)?
7. Please list the name of any children of yours, born of previous marriages (if applicable), and give their birthdates:

8. Please give the current addresses of the individuals listed in question 6 (if applicable):

9. Please list the name of children born of your current marriage, and give their birthdates:

10. Please give the current addresses of the individuals listed in question 8 (if applicable):

11. Have you ever adopted children, in your current marriage, or previous marriages, or as a single parent?

12. Please list the name of your parents and, if living, indicate in what city and state they currently live?

13. Do you have any siblings? If so, please give their full names and indicate in what city and state they currently live.

14. Do you have any grandchildren, if so, please give their full names and dates of birth:

15. Do you currently have a Will? If yes, please list the date of its execution.

16. Do you have, or have you ever made, any other estate planning documents (such as community property agreements, power of attorney(s), living wills, separate property agreements, trusts, family LLC's, family limited partnerships, etc)?

CURRENT ASSETS AND HOLDINGS

NOTE: If you are married, please indicate whether the property is community property, or your separate property. If you are unsure, simply do not list the status.

NOTE: If any of the property you list below is held by you and a person NOT your current spouse, please provide the co-owner's name and relationship to you.

1. Please list all real estate you currently own, including your principal residence, please give the address and parcel number of the property:

2. Please indicate if any of the real estate, listed above, is located in a state other than Washington.

3. Please list any brokerage accounts you possess, and provide the broker's name, location and phone number:

4. Please list any stock you own, including the company's name and the amount of shares owned, not held by a brokerage account and please list the name of any entity, its location and phone number, holding the stocks:

5. Please list any bank accounts, or c.d.'s you have, and provide the bank's name, location and phone number:

6. Please list any insurance policies you have, and provide the insurer's name, location and phone number:

7. Please list any retirement plan you have, such as 401 (k)'s, IRA's, SEP's, Employer Stock Option Plan, Profit sharing plans, etc.; and please indicate the name of any Employer, its location and phone number, if applicable:

8. Please list any monies owed you, as represented by promissory notes, oral agreements, etc., and list the name of the individual, or entity in your debt, and list the individual or entity's location and phone number:

9. Do you own your own business, or does your spouse own their own business:

10. Please list any privately owned (not publicly traded) S corporation, partnership, or LLC in which you own an interest (you should be receiving a K-1 each year for this type of interest); please include the entity's name, location, phone number, and Employer Identification Number, if known:

11. Please list the name of any trust(s), of which, you are a beneficiary:

12. Please list any intellectual property owned by you, such as copyrights, trademarks, patents, etc:

13. Please list the make, model and year of any vehicle(s) or watercraft(s) you own:

14. Please list and give a brief description of any other major personal property you hold that does not fit into the abovementioned categories (please list ONLY personal property you believe to have a value of \$2,000.00 or more):

15. Please give an estimate, no matter how rough, of the value of your estate, if possible segregate the community property share of your estate and the separate property share of your estate; if you are unsure as to status of property, simply provide the rough net worth of your holdings, individually if single, and jointly, if married:

PERSONALIZED GOALS OF ESTATE PLAN:

1. If married, would you like your entire estate to pass to your spouse, should he or she outlive you?
2. Should your spouse predecease you, or if you are single or are a widow(er) please indicate any individual you want to receive any particular piec of property, whether real, or personal, tangible, or intangible, owned by you:

3. Should your spouse predecease you, or if you are single or are a widow(er), please indicate to whom you wish the rest and remainder of your estate (possessions) to pass and indicate what percentage you want to go to the respective recipient:

4. Please indicate whom you would like to administer your estate (be the personal representative appointed in your Will or Trust Instrument), please provide at least one alternative, if your first choice is not available at the time needed:

5. If you have children under the age of eighteen (18), please list the individual(s) you would like to serve as guardians of your minor children, should you pass away before they reach majority (18). Please indicate if you would like the individual(s) named to have sole custody of your minor children, or if you would like them to share custody with another individual(s). Please be sure to ask about the choices made here, as your exact intentions should be made clear in your estate planning documents.

6. Would you like, or are you interested in, any of the following ancillary estate planning documents:

Power of Attorney:	Y/N
Living Will:	Y/N
Health Care Power of Attorney:	Y/N
Trust Instrument:	Y/N
Family LLC:	Y/N

Note: Please give a brief description of any other estate planning issues you would like considered: