

Estate Planning Questionnaire

Satterfield Legal, PLLC

Mailing Address:
4500 Cameron Valley Parkway, Suite 370
Charlotte, NC 28211

Office Phone: 980-389-1250
maria@satterfieldlegal.com
www.satterfieldlegal.com

Thank you for choosing Satterfield Legal, PLLC to assist you with your Estate Planning Needs. The information contained in this questionnaire will allow us to work together to develop a comprehensive plan based on your goals.

Please fill out the below information to the best of your ability. The information provided will be kept confidential, unless you authorize its release to others. Please note however, that if you and your significant other are both engaging the services of Satterfield Legal, PLLC, any and all information shared by either one of you will be treated as common knowledge to be shared among all of us, but confidentiality will remain with regard to any third party.

Date: _____ Referral Source: _____

YOUR PERSONAL INFORMATION:

Full Legal Name: _____

Date of Birth: _____ US Citizen? Yes No, Country of Citizenship _____

Address: _____

Primary Phone: _____ Alternate Phone: _____

Primary Email: _____ Alternate Email: _____

Occupation: _____ Employer: _____ Income: _____

Marital Status: Single Married Legally Separated Divorced Widowed Other: _____

SPOUSE'S PERSONAL INFORMATION:

Full Legal Name: _____

Date of Birth: _____ US Citizen? Yes No, Country of Citizenship _____

Address: _____

Primary Phone: _____ Alternate Phone: _____

Primary Email: _____ Alternate Email: _____

Occupation: _____ Employer: _____ Income: _____

Marital Status: Single Married Legally Separated Divorced Widowed Other: _____

CHILDREN:

FULL LEGAL NAME:

DATE OF BIRTH:

RELATIONSHIP

- Ours
- Mine
- Spouse's

- Ours
- Mine
- Spouse's

- Ours
- Mine
- Spouse's

YOUR ESTATE PLANNING OBJECTIVES:

Do you presently have a will? Yes (please provide copy) No

SPOUSE'S ESTATE PLANNING OBJECTIVES:

Do you presently have a will? Yes (please provide copy) No

FINANCIAL INFORMATION:

| <u>ASSETS:</u> | JOINT PROPERTY | YOUR SEPARATE PROPERTY | SPOUSE'S SEPARATE PROPERTY |
|------------------------|---------------------------|-----------------------------------|---------------------------------------|
| Cash and Bank Accounts | \$ | \$ | \$ |
| Primary Residence | \$ | \$ | \$ |
| <i>(Balance Owed)</i> | - (\$) | - (\$) | - (\$) |
| Other Real Estate | \$ | \$ | \$ |
| Investments | \$ | \$ | \$ |
| Personal Property | \$ | \$ | \$ |

| <u>LIABILITIES:</u> | JOINT DEBTS | YOUR SEPARATE DEBTS | SPOUSE'S SEPARATE DEBTS |
|----------------------------|--------------------|----------------------------|--------------------------------|
| _____ | \$ _____ | \$ _____ | \$ _____ |
| _____ | \$ _____ | \$ _____ | \$ _____ |
| _____ | \$ _____ | \$ _____ | \$ _____ |
| _____ | \$ _____ | \$ _____ | \$ _____ |
| _____ | \$ _____ | \$ _____ | \$ _____ |

LIFE INSURANCE: If there are applicable life insurance policies, please provide information with regard to the policy and beneficiary designation information below:

1. _____
2. _____
3. _____

RETIREMENT BENEFITS: If there are applicable retirement plans, please provide information with regard to the plan and beneficiary designation below:

1. _____
2. _____
3. _____

| <u>OTHER INTERESTS:</u> | YOU | SPOUSE |
|--|------------|---------------|
| Are you a beneficiary under any trust? <i>(If yes, provide copy)</i> | | |
| Are you a Trustee under any trust? <i>(If yes, provide copy)</i> | | |
| Are you likely to receive substantial inheritances in the future? | | |

ADDITIONAL INFORMATION:

Please state any additional matters which have not already been covered:
