

# Estate Planning Questionnaire

*Satterfield Legal, PLLC*

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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

		<input type="checkbox"/> Ours <input type="checkbox"/> Mine <input type="checkbox"/> Spouse's
		<input type="checkbox"/> Ours <input type="checkbox"/> Mine <input type="checkbox"/> Spouse's
		<input type="checkbox"/> Ours <input type="checkbox"/> Mine <input type="checkbox"/> Spouse's

**YOUR ESTATE PLANNING OBJECTIVES:**

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

**SPOUSE'S ESTATE PLANNING OBJECTIVES:**

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

**FINANCIAL INFORMATION:**

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

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

**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. \_\_\_\_\_

<b><u>OTHER INTERESTS:</u></b>	<b>YOU</b>	<b>SPOUSE</b>
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:

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