

Poskus, Caton & Klein, P.C.

303 East 17th Avenue, Suite 900

Denver, Colorado 80203

Telephone: (303) 832-1600

Facsimile: (303) 832-1676

Estate Planning Questionnaire

Prepared _____, 200_

A good estate plan requires that all relevant information concerning your personal, family, and financial situation be assembled. This form has been prepared to aid you in organizing that information.

PERSONAL INFORMATION:

Legal Name _____

Other Names Used _____

Birth Date _____

Home Address _____

Mailing Address _____

County of Residence _____

Home Telephone _____

Mobile Telephone _____

Occupation/Business _____

Business Address _____

Business Telephone _____

E-Mail Address _____

Fax Number _____

Single

Divorced

Widowed

If Widowed, Spouse's Name _____

Which telephone number(s) would you prefer we use:

Home

Mobile

Business

Which address would you prefer we use:

Home Business

CHILDREN:

<u>Name</u>	<u>Date of Birth (If a Minor)</u>	<u>Address (if not home)</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Is there a possibility of additional natural or adopted children? Yes No

Are all children of the same marriage or relationship? Yes No

If not, please elaborate: _____

OTHER INDIVIDUALS YOU MIGHT DESIRE TO BENEFIT:

<u>Name</u>	<u>Relationship</u>	<u>Date of Birth (If a Minor)</u>	<u>Address</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Referred By _____

NAMES OF ADVISORS:

Accountant _____

Insurance Agent _____

Financial Advisor _____

Are you pleased with all of your advisors? Yes No

OTHER CONSIDERATIONS:

Are you NOT a US citizen? Yes No
If yes, please explain: _____

Do you own property in any other country? Yes No
If yes, which country? _____

Do you have support or settlement obligations? Yes No
If yes, please provide a copy of that obligation.

Do you receive governmental benefits? Yes No
If yes, please explain: _____

Are any children or anticipated beneficiaries disabled? Yes No
If yes, please explain: _____

Will any of your anticipated beneficiaries (excluding minor children) need assistance with managing their funds? Yes No
If yes, please explain: _____

Do any of your anticipated beneficiaries receive governmental benefits? Yes No
If yes, please explain: _____

Are you the beneficiary of any trust? Yes No

Do you have a power of appointment under any trust? Yes No

Do you anticipate receiving a substantial inheritance? Yes No

Have you ever filed gift tax returns? Yes No
If yes, please provide copies of the returns.

Please provide any other information that may be relevant: _____

PLEASE PROVIDE COPIES OF THE FOLLOWING DOUCMENTS:

- Prior Wills or Trusts
- Prior Powers of Attorney Documents
- Prior Living Wills
- Separation Agreements
- Support Obligation Documentation
- Gift Tax Returns
- Prenuptial/Postnuptial/Antenuptial Agreements

PROPERTY INFORMATION:

How you own your property is important for purposes of properly designing and implementing your estate plan. For each property please indicate how it is titled. Please use the following abbreviations:

Owner of Property	Use applicable designations below:
Joint Tenancy	JT
If you cannot determine how the property is owned	?

REAL PROPERTY:

<u>General Description</u>	<u>Owner</u>	<u>Market Value</u>	<u>Loan Balance</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total _____

FURNITURE AND PERSONAL EFFECTS:

<u>Type or Description</u>	<u>Owner</u>	<u>Market Value</u>
<u>Miscellaneous Furniture and Household Effects</u>	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
	Total	_____

AUTOMOBILES, BOATS AND RVS:

<u>General Description</u>	<u>Owner</u>	<u>Market Value</u>	<u>Loan Balance</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
	Total	_____	_____

BANK & SAVINGS ACCOUNTS:

<u>Name of Institution</u>	<u>Account number</u>	<u>Type*</u>	<u>Owner</u>	<u>Amount</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
	Total			_____

* *Checking Account (CA), Savings Account (SA), Certificate of Deposit (CD), Money Market (MM). Please do not include IRAs or 401Ks here.*

OTHER LIABILITIES:

<u>Type</u>	<u>Debtor</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
		Total _____

SUMMARY OF VALUES:

<u>ASSETS</u>	<u>TOTAL VALUE</u>
Real Property	_____
Furniture and Personal Effects	_____
Automobiles, Boats, and RVs	_____
Bank and Savings Accounts	_____
Stocks and Bonds	_____
Life Insurance and Annuities	_____
Retirement Accounts	_____
Business Interests	_____
Money Owed To You	_____
Other Assets	_____
Other Liabilities	(_____)
TOTAL NET ASSETS	_____

FIDUCIARIES:

Please consider which persons you would like to administer your estate and/or trusts, and who would care for your minor children.

Please Provide Name, Address & Phone for Each:

Personal Representative: (This is the person who administers your estate.)

Initial

1st Successor

2nd Successor

(optional)

If Applicable:

Trustee: (This is the person who administers your trust funds.)

Initial

1st Successor

2nd Successor _____
(optional) _____

Guardian: (This is the person who will be caring for your minor children.)

Initial _____

1st Successor _____

2nd Successor _____
(optional) _____

Will your choice of guardian be affected by the marriage, divorce, remarriage, or relocation of the persons named? Yes No
If yes, please explain: _____

DISPOSITION OF ESTATE:

What are your general desires as to the disposition of your estate?

Children equally. Outright or In Trust. If in trust, please specify your desires: _____

Other: _____

Specific Gifts

<u>Amount or Description of Gift</u>	<u>Name of Individual or Charity</u>	<u>Relationship or Address</u>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
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Personal Property

Do you want to provide that your personal property will be distributed according to a written list you may prepare later? Yes No

Any property not listed should be distributed to whom?

- Children equally
 Other: _____

Pets

Do you own pets? Yes No

If yes, Do you wish to provide for your pets? Yes No

If yes, please explain: _____

OTHER COMMENTS:

GENERAL POWER OF ATTORNEY:

Have you ever given a power of attorney to another? Yes No
If yes, please explain: _____

Do you want to appoint another to manage your finances should you become unable to manage them on your own? Yes No

General Power of Attorney Agent: (Please list name and address.)

You

Initial

1st Successor
(optional)

2nd Successor
(optional)

Do you want that power to be immediately effective or become effective upon a doctor's letter? _____

MEDICAL DIRECTIVES:

Have you ever signed any medical directives?

Yes

No

If yes, please explain: _____

Do you want to appoint another to make your medical decisions should you become unable to make them on your own?

Yes

No

If yes,

Medical Power of Attorney Agent: (Please list name and address.)

You

Initial

1st Successor

2nd Successor
(optional)

Do you want a living will that directs the hospital as to your end of life decisions?

Yes

No

If yes,

Do you want the living will or the decisions of your agent to control if a conflict between the two were to arise? _____

DISPOSTION OF YOUR REMAINS:

Do you desire special instructions regarding burial or cremation? Yes No

If yes, please explain: _____

Do you desire special instructions regarding a funeral or memorial? Yes No

If yes, please explain: _____

Do you desire to make anatomical gifts? Yes No

If yes, please explain: _____

Signature: _____

Date: _____