
ESTATE PLANNING QUESTIONNAIRE FOR INDIVIDUALS

1. Legal Name: _____

2. If different from #1, please list other names by which you are known on deeds, stock certificates, bank accounts, etc.:

3. Home Address: _____

4. Home Phone: (____) ____ - ____ Cell Phone: (____) ____ - ____

Work Phone: (____) ____ - ____

5. Email: _____

6. D.O.B.: _____

7. Citizenship: _____

8. Soc. Sec. #: _____

9. Occupation: _____

10. Children (*indicate if by previous marriage, adopted, or deceased*):

a. Name: _____ D.O.B.: _____ Soc. Sec. #: _____

Address: _____

b. Name: _____ D.O.B.: _____ Soc. Sec. #: _____

Address: _____

c. Name: _____ D.O.B.: _____ Soc. Sec. #: _____

Address: _____

d. Name: _____ D.O.B.: _____ Soc. Sec. #: _____

Address: _____

11. Other Beneficiaries, if any (*indicate relationship*):

a. Name: _____ D.O.B.: _____ Soc. Sec. #: _____

Address: _____

b. Name: _____ D.O.B.: _____ Soc. Sec. #: _____

Address: _____

12. Military Service: Branch _____ Serial Number _____

13. Advisors (*list name, firm, address, and telephone number*):

Broker/Investment advisor _____

Bank/Trust Officer _____

Accountant/Tax Preparer _____

Insurance Agent _____

Other Attorney _____

14. Please bring with you copies of any existing estate plan documents (*if you can find them*)