



ESTATE PLANNING QUESTIONNAIRE FOR MARRIED COUPLES

1. Legal Names:

Spouse 1: _____

Spouse 2: _____

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

Spouse 1: _____

Spouse 2: _____

3. Home Address: _____

4. Home Phone: (____) ____ - _____

5. Date of Marriage: _____ Place of Marriage: _____

Spouse 1

Spouse 2

6. Cell Phone: (____) ____ - _____

(____) ____ - _____

7. Work Phone: (____) ____ - _____

(____) ____ - _____

8. Email: _____

9. D.O.B.: _____

10. Citizenship: _____

11. Soc. Sec. #: _____

12. Occupation: _____

13. Military Service: _____

14. 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: _____

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

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

Address: _____

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

Address: _____

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

Broker/Investment advisor _____

Bank/Trust Officer _____

Accountant/Tax Preparer _____

Insurance Agent _____

Other Attorney _____

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