

McAndrews, Mehalick, Connolly, Hulse and Ryan P.C.



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ATTORNEYS AT LAW

ESTATE PLANNING QUESTIONNAIRE

Date: _____

CLIENT:

Name: _____

Date of Birth: _____

Home Address: _____

County of Residence: _____

Home Phone Number: _____

Cell: _____

Email: _____

Are You a U.S. Citizen: _____

Marital Status: _____

Employer: _____ Occupation: _____

Do you have Wills, Trusts, or Powers of Attorney in place? _____

If you answered yes, please provide copies of the documents and name of prior attorney.

Referred by: _____

Children and Other Dependents:

Name and Address	Relationship	Date of Birth	Physical or Mental Disability?
1. _____ _____ _____	_____	_____	_____
2. _____ _____ _____	_____	_____	_____
3. _____ _____ _____	_____	_____	_____
4. _____ _____ _____	_____	_____	_____

If any children or dependents are mentally or physically challenged, please attach a medical/psychological report or other description.

Life Insurance:

Type	Death Benefit	Insured	Owner	Beneficiary
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Name of Executor/Executrix: Person(s) charged with administering your estate.

Client 1 Executor: _____

Address: _____

Client 1 Successor Executor: _____

Address: _____

Name and Address of Guardian(s) of Minor Children (under the age of 18):

Guardian: _____

Address: _____

Successor Guardian: _____

Address: _____

Financial Power of Attorney: Person(s) appointed to act on your behalf for financial matters.

Client 1 Agent Name: _____

Address: _____

Telephone: _____

Client 1 Successor Agent Name: _____

Address: _____

Telephone: _____

Health Care Power of Attorney: Person(s) appointed to act on your behalf for medical matters.

Client 1 Agent Name: _____

Address: _____

Telephone: _____

Client 1 Successor Agent Name: _____

Address: _____

Telephone: _____

ASSETS

Indicate approximate values in appropriate columns.

<u>Property Description</u>	<u>Asset</u>	<u>Value</u>
Personal and household articles (generally assumed to be joint property)	_____	_____
Valuable collections, art, Jewelry, antiques (include all items covered by insurance/rider)	_____	_____
Automobiles	_____	_____
Checking account(s)	_____	_____
Savings account(s)	_____	_____
Money market or savings certificates	_____	_____
Stocks and bonds	_____	_____
Business interest (please describe)	_____	_____
Home (net of mortgage)	_____	_____
Other real estate (with location)	_____	_____
Pension or Profit-sharing	_____	_____

Identify beneficiaries: _____

IRAs _____

Identify beneficiaries: _____

Other Retirement Plan _____

Identify beneficiaries: _____

ASSETS CONTINUED

Indicate approximate values in appropriate columns.

<u>Property Description</u>	<u>Asset</u>	<u>Value</u>
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529 Account(s) _____

Identify beneficiary: _____

Cryptocurrency, NFTs, etc.: _____

Identify type/account: _____

Other Assets _____

Please describe: _____

Debts or Liabilities

Please list any significant debts or other financial liabilities (e.g. mortgages, loans, etc.)

Disposition of Estate

Please provide a general description of the disposition of your property which you (and your spouse, if applicable) desire upon your death(s).

Disposition of Estate If No Survivors (i.e., to my intestate heirs, charities, other individuals)

Please provide any specific questions, health issues or concerns below:

Please be advised that we charge an initial consultation fee of \$495.00. This fee includes the review of your questionnaire and prior documents, if any, and a one-hour consultation with an estate planning attorney.

This fee must be paid in advance of your meeting.

Upon receipt of the completed Questionnaire, McAndrews Law Offices, P.C. will contact you to schedule an initial meeting. Our base fees for estate planning documents are below. Please contact our office if you have any questions.