

*McAndrews, Mehalick, Connolly,
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Attorneys At Law

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ESTATE PLANNING QUESTIONNAIRE

Client 1: _____

Date: _____

Date of Birth: _____

Home Address:

Employer:

Occupation: _____

Phone No.: _____

Cell: _____

Email: _____

Are You a U.S. Citizen: _____

Client 2: _____

Date of Birth: _____

Employer:

Cell: _____

Email: _____

Occupation: _____

Are You a U.S. Citizen: _____

Date and Place of Marriage: _____

Have you or your spouse been married before? _____

Do you have current Pre- or Postnuptial Agreements, Wills, Trusts, or Powers of Attorney? _____ (If yes, please provide copies and name of prior attorney).

Referred by: _____

Children and Other Dependents:

Name	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
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

* C1 = Client 1 C2 = Client 2 O = Other
Name: _____

Name of Executor/Executrix:

Address:

Name of Alternate Executor/Executrix:

Address:

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

Client 1: Power of Attorney (please name):

Agent: Name, address and relationship to you (person appointed to act on your behalf for medical and financial matters):

Name of **Successor** Agent (person appointed to *replace* named Agent above, if Agent is not able or willing to act on your behalf):

Client 2: Power of Attorney (please name):

Agent: Name, address and relationship to you (person appointed to act on your behalf for medical and financial matters):

Name of **Successor** Agent (person appointed to *replace* named Agent above, if Agent is not able or willing to act on your behalf):

ASSETS

Indicate approximate values in appropriate columns

<u>Property Description</u>	<u>Joint</u>	<u>Client 1</u>	<u>Client 2</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 or savings accounts	_____	_____	_____
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:	_____	_____	_____
Other Assets	_____	_____	_____
Cryptocurrency, NFTs, etc.: Identify type/account	_____	_____	_____

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:

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

2022 Base Fee Schedule

Base fees include: review of completed questionnaires, estate planning consultation of 1 hour with attorney, drafting of documents, ½ hour of attorney time for changes to documents or questions, and brief meeting to sign documents in our office, typically with paralegals)

Wills:

Simple Wills (no trusts, no complex terms)	\$450 each (base fee)
Codicils	\$425 each (base fee)
Pour Over Wills <i>(Must be done with Revocable Living Trust)</i>	\$295 each (base fee)

Testamentary Trusts (Trusts in Will, Codicil, or Revocable Trust) Fee is per Will/Trust:

Child's Trust <i>(To protect child's share during minority or longer, to protect in event of divorce, etc.)</i>	\$210.00 each
Disclaimed Property Trust (tax planning) <i>(Generally, married couple with estate of approximately \$5 million or greater)</i>	\$75.00 each
Credit Shelter Trust (tax planning) <i>(generally, married couple close to or exceeding current Federal Estate Tax Exemption)</i>	\$275.00 each
Marital Trust <i>(generally, married couple with tax concerns, children from prior relationships, money management concerns)</i>	\$75.00 - \$200.00 each
Pet Trust	\$125.00 each

Inter Vivos Trusts:

Revocable Living Trusts <i>(Must be done with Pour Over Will)</i>	\$1,100.00
Third Party Funded Special Needs Trust	\$990.00 each
Life Insurance Trust <i>(including form for necessary annual notice documents, letters of instruction, etc.)</i>	\$1,500.00 each
Employer Identification Number (EIN)	\$195 each

Complex Terms in any Will or Trust: \$45.00 – \$295.00 each
(i.e., specific bequests, charitable bequests, etc.)

Powers of Attorney/Living Wills:

Combined Financial and HealthCare POA	\$225.00 each
Living Will	\$95.00 each
Health Care POA with Living Will	\$150.00 each
Financial Powers of Attorney	\$170.00 each
Meeting with attorney to determine capacity	\$195.00 (additional cost)
Mental Health POA	\$400.00 each

Documents Subject to Hourly Billing:

Trust Amendments

Consent agreements or Non Judicial Settlement Agreements

Self-Funded Special Needs Trusts

Other Tax Planning or Elder Law Trusts

Meetings outside of our office