

REMY LAW

ESTATE PLANNING QUESTIONNAIRE

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The information you provide on this form is kept confidential and is used only to prepare your estate plan.

A. PERSONAL INFORMATION

1. Your Information

Full Name

Citizenship

Date of Birth

Occupation

Employer

Home Address

Work Address

Home Phone

Cell Phone

Work Phone

E-mail

Have you ever been known by another name?

Yes

No

If yes, what?

2. Spouse's Information

Full Name

Citizenship

Date of Birth

Occupation

Employer

Home Address

Work Address

Home Phone

Cell Phone

Work Phone

E-mail

Have you ever been known by another name?

Yes

No

If yes, what?

3. Do you have children?

Yes No

If yes, complete the following:

Name	Date of Birth	Address	# Children	Prior Marriage?

4. Do you have grandchildren?

Yes No

If yes, complete the following:

Name	Date of Birth	Address

5. Do you have dependents other than children?

Yes No

If yes, complete the following:

Name	Date of Birth	Address

6. Do you have any living parents?

Yes No

If yes, complete the following:

Name	Date of Birth	Address

B. PLANNING AND GOALS**1. Do you currently have a Will?**

Yes No

*If yes, please attach a copy to this questionnaire.***2. Do you currently have a Trust?**

Yes No

If yes, please attach a copy to this questionnaire.

3. What are your major priorities in the event of your death, and how would you like your estate handled?

4. Other than minor children, do you anticipate anyone being dependent on you?

Yes

No

If yes, please explain:

5. Beneficiaries of your Estate / Trust:

Name	Date of Birth	Address

6. How would you like shares for each beneficiary set aside (equal shares, percentages, etc.)?

7. Would you want to delay or stagger distribution to your beneficiaries?

Yes

No

If yes, describe how distribution should be delayed or staggered:

8. Do you wish to make any charitable bequests or specific bequests?

Yes

No

If yes, please describe:

9. Disaster Provision

In the event of a disaster where you and all of your named beneficiaries pass together, or you pass without any surviving beneficiaries, we normally plan for your estate or trust property to be distributed pursuant to your intestate succession (the Michigan law family tree) and then to a charity in your name.

Is this how you would like your disaster provision set up?

Yes

No

If no, explain what you would like:

10. Have you ever made gifts to any one person in a single year that exceeded the annual gift tax exclusion amount?

Yes

No

If yes, was a U.S. Gift Tax Return (Form 709) filed?

Yes

No

If yes, please attach a copy to this questionnaire.

11. Do you have a power of appointment from another person's Will or trust?

Yes No

If yes, please explain:

12. Do you have specific concerns requiring special attention?

Yes No

If yes, please explain:

C. FIDUCIARIES

List your choices in order. Additional choices are optional.

1. Personal Representative (Executor) of your Will

Client:

Choice	Name	Relationship	Address
1st			
2nd			
3rd			
4th			
5th			

Spouse:

Choice	Name	Relationship	Address
1st			
2nd			
3rd			
4th			
5th			

2. Trustees (may be a financial institution)

Client:

Choice	Name	Relationship	Address
1st			
2nd			
3rd			
4th			
5th			

Spouse:

Choice	Name	Relationship	Address
1st			
2nd			
3rd			
4th			
5th			

3. Guardian of Minor Children

Choice	Name	Relationship	Address
1st			
2nd			
3rd			
4th			
5th			

4. Attorney-in-Fact (Financial Power of Attorney)**Client:**

Choice	Name	Relationship	Address
1st			
2nd			
3rd			
4th			
5th			

Spouse:

Choice	Name	Relationship	Address
1st			
2nd			
3rd			
4th			
5th			

5. Patient Advocate (Medical Decisions)

Client:

Choice	Name	Relationship	Address
1st			
2nd			
3rd			
4th			
5th			

Spouse:

Choice	Name	Relationship	Address
1st			
2nd			
3rd			
4th			
5th			

6. Are there any other facts, background or goals not detailed in this questionnaire?

D. FINANCIAL INFORMATION

Fill out below or attach a copy of a recent financial statement.

Real Property

Please attach a copy of the deed to all real property if possible.

Business Interests

List all business interests owned by you and/or your spouse.

Questions? Email us at George@georgeremylaw.com or call (734) 245-2556