

ATTORNEY-CLIENT PRIVILEGED INFORMATION

E1001S

Estate Planning Client Questionnaire

(Small Estates - Routine Dispositions)

	You	Your spouse
Name	_____	_____
Date of Birth	_____	_____
Social Security No.	_____	_____

- 1. Permanent home address _____
- 2. Telephone Number _____
- 3. Business address _____
- 4. At which address do you wish to be contacted? _____ Home or _____ Business
- 5. How long have you lived in Texas? _____
- 6. In what county do you live? _____
- 7. Are you (and your spouse) United States citizens? _____
- 8. In what state were you married? _____

9. Children, Grandchildren and Other Dependents

Name	Address	Date of Birth	Relationship
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

10. Marital history (for each of you)

	You	Your spouse
Were you previously married?	_____	_____
If so, how many times?	_____	_____
If so, did you have children with your former spouse	_____	_____

- 11. What is your approximate present net worth? _____
- 12. Are you or your spouse the beneficiary of any trust? _____
- 13. Do you or your spouse own a business? _____
- 14. Is this business an S corporation? _____

15. Estate Planning Objectives

A. Retirement Needs and Objectives _____

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B. Provision for Spouse at Death _____

C. Provision for Children at Death _____

D. Gift Program for Spouse and Children _____

E. Gifts to Charities _____

16. Do you currently have any of the following: (if so, please identify the location)

Will(s) _____

Revocable Trust(s) _____

Irrevocable Trust(s) _____

Other pertinent documents (e.g., durable power of attorney, health care power of attorney, life insurance policies, annuity contracts, real property deeds, etc.) _____

17. Have you ever filed a Gift Tax Return? _____

18. Who are your Current Advisors (names and addresses)

Other Attorneys _____

Accountant _____

Life Insurance Agent _____

Closest relative(s) _____

19. Trusted persons: In the event you and your spouse are not able to make decisions due to death, incapacity, etc., please list the names and addresses of the persons you would want to serve as executors of your estate, Trustees of any trusts, guardians of your children, and agents in the event you cannot make decisions:

