

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

NAME: _____ DATE OF BIRTH: _____ SOC. SEC. #: _____
 SPOUSE NAME: _____ DATE OF BIRTH: _____ SOC. SEC. #: _____
 ADDRESS: _____ HOME PHONE: _____
 _____ CELL PHONE: _____
 YEARS FL RESIDENCY: _____ WORK PHONE: _____
 EMAIL ADDRESS(ES): _____
 YEAR MARRIED: _____ # OF CHILDREN: _____ # OF GRANDCHILDREN: _____

NAMES OF CHILDREN	CITY & STATE	AGE	CHECK IF DECEASED	PHONE #	MARITAL STATUS

ESTIMATED VALUE OF EXPECTED SIGNIFICANT INHERITANCES (IF APPLICABLE)	EXPECTED RECIPIENT (IF APPLICABLE) HUSBAND (H) WIFE (W) JOINT (J)

ASSET TYPE	ESTIMATED FAIR MARKET VALUE	OWNERSHIP (IF APPLICABLE) HUSBAND (H) WIFE (W) JOINT (J)
Cash in Bank Accounts & CDs		
Stocks, Bonds, & Mutual Funds		
Mortgage Receivables or Loan Receivables (owed TO you)		
Equity in Residence (net of mortgages or loans owed BY you)		
Equity in Other Realty (net of mortgages or loans owed BY you)		
Business Interests		
Partnership Investments		
IRA/401(k) Retirement Accounts		
Pension Death Benefits		
Life Insurance/Death Benefits (net of loans borrowed against policies)		
Annuities		
Tangible Personal Property		
Other Assets		
TOTAL ESTIMATED VALUE		

Please bring the following to your Estate Planning Consultation: Any existing Will(s), Trust(s), Power(s) of Attorney, Living Will(s), Designation(s) of Health Care Surrogate, etc., Pre-Nuptial or Post-Nuptial Agreements, Marital Settlement Agreements, recent statement for each brokerage and retirement account



GRAND & GRAND

4010 Sheridan St., Hollywood, FL 33021

Phone: (954) 989-2889, Fax (954) 961-4216

Email: mgrand@grand-law.com, cgrand@grand-law.com