



[www.affordable-legal-documents.com](http://www.affordable-legal-documents.com)

## Single Female Estate Planning Questionnaire

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Citizenship: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Prior Marriages: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Health History: \_\_\_\_\_

Employment \_\_\_\_\_

Business Address: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Business Fax: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ email: \_\_\_\_\_

Current estate plan: \_\_\_\_\_

Residence Address: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Home Fax: \_\_\_\_\_ email: \_\_\_\_\_



## Single Female Estate Planning Questionnaire

Child #1 Name \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Parents \_\_\_\_\_  
Spouse's name \_\_\_\_\_ No. of Children \_\_\_\_\_  
Location \_\_\_\_\_  
Special Needs in this family? \_\_\_\_\_

Child #2 Name \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Parents \_\_\_\_\_  
Spouse's name \_\_\_\_\_ No. of Children \_\_\_\_\_  
Location \_\_\_\_\_  
Special Needs in this family? \_\_\_\_\_

Child #3 Name \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Parents \_\_\_\_\_  
Spouse's name \_\_\_\_\_ No. of Children \_\_\_\_\_  
Location \_\_\_\_\_  
Special Needs in this family? \_\_\_\_\_

Child #4 Name \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Parents \_\_\_\_\_  
Spouse's name \_\_\_\_\_ No. of Children \_\_\_\_\_  
Location \_\_\_\_\_  
Special Needs in this family? \_\_\_\_\_

Child #5 Name \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Parents \_\_\_\_\_  
Spouse's name \_\_\_\_\_ No. of Children \_\_\_\_\_  
Location \_\_\_\_\_  
Special Needs in this family? \_\_\_\_\_

\*Add additional children's information in Additional Information and Notes at the end.



## Single Female Estate Planning Questionnaire

### Parties to the Documents

#### Revocable Living Trust

**Trust Name** (e.g. The Jane Doe Revocable Trust) \_\_\_\_\_

#### **Trustees**

Original Trustee(s) \_\_\_\_\_

1<sup>st</sup> Successor: \_\_\_\_\_

2<sup>nd</sup> Successor: \_\_\_\_\_

**Trust Distribution:** (Describe how you would like to have your assets distributed upon your death.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### Wills

##### **Personal Representative**

Primary \_\_\_\_\_

1st Alternate \_\_\_\_\_

2nd Alternate \_\_\_\_\_

##### **Guardians:**

1<sup>st</sup> Choice \_\_\_\_\_

2<sup>nd</sup> Choice \_\_\_\_\_

#### Powers of Attorney

##### **Health Care Power of Attorney**

Primary \_\_\_\_\_

1st Alternate \_\_\_\_\_

2nd Alternate \_\_\_\_\_

##### **General Durable Power of Attorney**

Primary \_\_\_\_\_

1st Alternate \_\_\_\_\_

2nd Alternate \_\_\_\_\_



## Single Female Estate Planning Questionnaire

### Assets and Liabilities

<u>Description</u>	<u>Debt</u>	<u>Fair Market Value</u>
<b>Personal Property, Collectables, etc.</b>		
_____	_____	_____
_____	_____	_____
_____	_____	_____
<b>Vehicles, Boats, Toys, etc.</b>		
_____	_____	_____
_____	_____	_____
_____	_____	_____
<b>Cash, Checking &amp; Savings Accounts</b>		
_____	_____	_____
_____	_____	_____
_____	_____	_____
<b>Consumer / Credit Card Debt</b>		
_____	_____	_____
_____	_____	_____
<b>Personal Use Real Estate</b>		
_____	_____	_____
_____	_____	_____
<b>Rental Real Estate</b>		
_____	_____	_____
_____	_____	_____
_____	_____	_____



## Single Female Estate Planning Questionnaire

### Land & Development Real Estate


### Closely-Held Businesses, Partnerships, etc.


### Notes or Accounts Receivable:


### IRAs & Retirement Plans


### Investments




[www.affordable-legal-documents.com](http://www.affordable-legal-documents.com)

## Single Female Estate Planning Questionnaire

### Life Insurance:

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Inheritance:

_____	_____
_____	_____

### Sources of Income

Source	Annual Amount
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

### Additional Information & Notes



[www.affordable-legal-documents.com](http://www.affordable-legal-documents.com)

## **Single Female Estate Planning Questionnaire**

### **Additional Questions**

1. Do you have any legal or financial obligations to prior spouses or children?
2. Do you have any NON-USA assets?
3. Do you owe the IRS any money?
4. Are you currently under audit by the IRS?
5. Are there any years for which you have not filed a tax return?
6. Do you have any outstanding judgments or unsatisfied creditor claims?
7. Are you a sole proprietor, partner or general partner in a business venture?
8. Are you a guarantor on any obligations not disclosed in the above financial information?