

ESTATE PLANNING

Client Questionnaire

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ESTATE PLANNING
CLIENT QUESTIONNAIRE
General Personal Information

Please print names as you wish them to appear on all documents.

Husband's Name: _____ **Birthdate:** _____
U.S. Citizen? _____ Social Security No.: _____

Wife's Name: _____ **Birthdate:** _____
U.S. Citizen? _____ Social Security No.: _____

Address: _____

Telephone: _____

CPA: _____

Address: _____

Telephone: _____

Broker/Financial Advisor: _____

Address: _____

Telephone: _____

Children and Grandchildren:

Please indicate whether any children are from a previous marriage, and specify which spouse and date of divorce. Use additional sheets if necessary.

Name	Birthdate
_____	_____
_____	_____
_____	_____

Who Do You Want to Inherit Your Property?

A beneficiary is the person who will inherit your property (both real and personal) under your will. Also keep in mind that, in general, you each own a one-half community property interest in everything acquired during marriage in Texas; thus the Will of the first spouse to die can only bequeath the one-half community interest to persons other than the spouse.

Primary Estate Beneficiary:

Spouse

Other _____

Alternate Beneficiaries *(In the event your first choice of beneficiary predeceases you):*

Children: Treated equally unless otherwise specified

Other _____

Contingent Beneficiaries *(In the event you are not survived by any of your primary or alternate beneficiaries):*

Your heirs-at-law *(as determined by Texas Statutes of Descent and Distribution)*

Charity _____

Other _____

Specific Bequests

We recommend that bequests of smaller items of personal property not be included in your Will. A letter to your Executor, which can be referenced in your Will, is usually sufficient to bequeath such items.

Individual's Name

Description of Items Bequeathed

_____	_____
_____	_____
_____	_____

Other Disposition Desired:

_____	_____
_____	_____

Fiduciary Appointments

Executor: This person is appointed by you to carry out the directions and requests in your will, and to dispose of your property according to your testamentary provisions. This will normally be your spouse or a close family member. Your Executor has the responsibility to file your Will for probate; collect assets and pay all claims, expenses and taxes; distribute your property to your heirs or trustees; and in general to wind up your affairs. You may also appoint Co-Executors or Co-Trustees. If you have a large estate or will leave substantial sums in trust, you may wish to appoint a bank or trust company as Co-Executor or Co-Trustee.

Trustee: This is the person you designate to administer a trust. It is normally the same person as your Executor. Your Trustee will have responsibility for the long-term management of property held in trust for beneficiaries designated by you. In a strict sense, a "trustee" is one who holds the legal title to property for the benefit of another.

Husband: Executor/Trustee

1st _____

2nd (Co-) _____

3rd (Co-) _____

Wife:

1st _____

2nd (Co-) _____

3rd (Co-) _____

Financial Information Summary: Do You Need Estate Tax Planning?

Estate taxes may be owed by individuals whose estates exceed a certain limit. There are estate planning tools that we may be able to use to limit or eliminate such taxes. In order to plan adequately, we need to know your total net worth. Please list all of your assets, including the face value of life insurance, any interest in businesses, and your various retirement plans. Our fees are in no way associated with your net worth.

	Assets	Value
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____
9.	_____	_____
10.	_____	_____

	Liabilities	Amount Owed
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____

Total Net Worth: _____

Other Estate Planning Instruments

Agent: A power of attorney confers upon an agent the authority to perform certain specified acts on behalf of a principal. Depending on the acts to be performed, this appointment will normally be your spouse, followed by close family members or personal friends.

Statutory Power of Attorney

The Texas Legislature adopted the Uniform Durable Power of Attorney Act in 1993. The act provides a statutory form by which you may designate an agent (“attorney-in-fact”) who will have the authority to act on your behalf with respect to your financial affairs and property. In the event you become disabled or otherwise unable to act for yourself, your agent will be able to transfer property, convey title, execute financial transactions etc. The document affords protection to (and is often required by) third parties such as banks and title companies.

Husband:	Agent	Relationship
Primary:	_____	_____
Alternate:	_____	_____
Wife: Primary:	_____	_____
Alternate:	_____	_____

Medical Power of Attorney

This document grants your agent the power to make health care decisions for you if you are unable to do so. Your agent will have the authority to make a broad range of decisions concerning your medical treatment but only if your physician has certified in writing that you lack the capacity to make such decisions yourself.

Husband:	Agent	Address and Telephone
Primary:	_____	_____
Alternate:	_____	_____
Wife: Primary:	_____	_____
Alternate:	_____	_____

Directive to Physicians (Living Will)

Artificial life support procedures now enable doctors to sustain a person's life indefinitely, oftentimes long after the brain has ceased functioning or the individual has any awareness of life. This document, adapted from the Texas Natural Death Act, provides instructions to an attending physician concerning the use of heroic or extraordinary measures in the event you are terminally ill. If your physician has determined that your condition is irreversible and death is imminent, this document permits physicians to "pull the plug" or withhold artificial life support, allowing you to die naturally.

Guardian of Minor Children *(In the event neither parent is available):*

A guardian is a person lawfully invested with the power, and charged with the duty, of taking care of the person and managing the property and rights of another person, who, for defect of age, understanding, or self-control, is considered incapable of administering his own affairs. A guardian is also a person who legally has the care and management of the person, or the estate, or both, of a child during his/her minority.

Primary: _____

Alternate: _____

Other Things you wish to discuss:
