

**QUESTIONNAIRE****Estate planning****Key question**

Can you successfully transfer the assets you have worked a lifetime to accumulate?

**Personal information**Marital status:  Single  MarriedNumber of children: \_\_\_\_\_ Any children from a previous marriage?  Yes  No

Approximate net worth: \_\_\_\_\_

Is it important that your children maintain some connection to the operation?  Yes  No**Business****To whom do you want to transition the business?** Unrelated third party Key employee Not sure Family member – child or other No one. I will wind down the business Other: \_\_\_\_\_**When do you want to transition out of the operation?** During lifetime At what age? \_\_\_\_\_ At death Not sure**How do you want to transition?** Sell Bonus Gift Other: \_\_\_\_\_**Please provide a list of assets or a balance sheet.**

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## Upon the first death

### Survivor needs (if married)

#### Fiduciaries or people who will help

Who do you trust for financial matters? For health care concerns?

It is best to name a couple of people to help you with these issues. Try to name your top three:

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#### Surviving spouse or partner

Please check all that are concerns:

- Income replacement                       Remarriage protection                       Creditor protection

Do you want amounts going to the surviving spouse protected or given outright?

- I want to protect and specify how my assets are distributed.  
 I want all my assets to go directly to my spouse.

#### Descendants

Are any assets going to descendants upon the first death? \_\_\_\_\_% or \$ \_\_\_\_\_

Which descendants? \_\_\_\_\_

Is estate equalization a concern?  Yes  No

#### Community

Are there any amounts going to your community upon the first death? \_\_\_\_\_% or \$ \_\_\_\_\_

Which organizations? \_\_\_\_\_

## After you are both gone

#### Descendants

Total amounts going to your descendants: \_\_\_\_\_% or \$ \_\_\_\_\_

Do you want amounts going to your descendants protected, structured distributions or given outright?

Check one:

- I want to protect and specify how assets are distributed to my descendants and how they may be used.  
 I want assets to be distributed according to a specific schedule.  
 I want assets to go directly to my descendants.  
 Other (please share you vision for how your estate will distribute):

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**Please check all that are concerns:**

- Spending protection (such as preventing descendants from spending assets too quickly)
- Special needs (financial or medical; may include guidance for care and use of assets)
- Divorce protection (such as protecting assets for your descendants)
- Blended family concerns (such as plans to help ensure descendants are treated equitably)
- Creditor protection (strategies for placing assets beyond the reach of future creditors)

**Community**

**Amounts going to your charity** \_\_\_\_\_% or \$ \_\_\_\_\_

Which organizations?

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This questionnaire is used for the purpose of discovering client needs. It is not intended for the sole purpose of recommending life insurance.

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