

THE HERITAGE LAW GROUP

Susan I. Jean & Associates, PC

ESTATE PLANNING QUESTIONS

*If you have any estate planning documents already in place, bring them to the appointment

Your info

Spouse's info (if married)

Your Full Name:

Address:

Cell Phone:

Home Phone:

Email Address:

Employer, if any:

Date of Birth:

Citizenship, if not US:

PROFESSIONAL ADVISORS

Do you have a financial advisor? [] yes [] no

May we contact him/her? [] yes [] no

Address/Phone: _____

Name: _____

Institution: _____

Do you have a tax professional? [] yes [] no

May we contact him/her? [] yes [] no

Address/Phone: _____

Name: _____

Institution: _____

MEDICAL

Do you have a long term care insurance policy? [] yes [] no

Special Needs/Health Concerns:

CHILDREN'S INFORMATION

Child #1

Child #2

Full Legal Name:

Address:

Cell Phone:

Home Phone:

Date of Birth:

Is s/he Married?

Concerns?

For married clients:

- child of marriage
- Husband's child
- Wife's child

- child of marriage
- Husband's child
- Wife's child

Child #3

Child #4

Full Legal Name:

Address:

Cell Phone:

Home Phone:

Date of Birth:

Is s/he Married?

Concerns?

For married clients:

- child of marriage
- Husband's child
- Wife's child

- child of marriage
- Husband's child
- Wife's child

Have any children passed away? Names: _____

MISCELLANEOUS QUESTIONS

Do you anticipate an inheritance from someone else's Will or Trust? [] yes [] No

If yes, please bring a copy of the Will or Trust to your appointment and an estimate of the approximate amount anticipated (if possible).

Who should manage your estate at your death?

Primary Name:

Address/phone if not listed above:

Alternate Name:

Address/phone if not listed above:

Do you have any guns that are listed on the National Firearms Act (NFA)? [] yes [] No

If you have children under age 18, who should be their Guardian at your death?

Primary Name:

Address/phone if not listed above:

Alternate Name:

Address/phone if not listed above:

How did you hear about us? _____

If you were referred by an individual, may we thank him or her? [] Yes [] No

	Husband (or Client's assets, if unmarried)	Wife	Jointly owned by both spouses	Other	Beneficiary (if known)
Real Estate (estimate fair market value - you can note mortgages under "debt")					
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
Life insurance - death benefit values					
	\$	\$	n/a	n/a	
	\$	\$	n/a	n/a	
	\$	\$	n/a	n/a	
	\$	\$	n/a	n/a	
Vehicles, boats, items of unusual value, etc.					
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
Business interests, other misc. assets					
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
	\$	\$	\$	\$	
Total Assets	\$	\$	\$	\$	

