

KRAEMER, KENDALL & BENSON
LIMITED LIABILITY COMPANY

ATTORNEYS AND CONSULTANTS

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PRELIMINARY ESTATE PLANNING QUESTIONNAIRE

This form will be very helpful and save time in gathering relevant facts concerning family and financial matters. Please complete the attached financial statement as well and supplement information as appropriate.

Part I - General Information

Date of Preparation: _____

1. Your Full Name: _____
Date of birth: _____
Social Security No.: _____
Citizen of USA: ___ Yes ___ No

2. Spouse's Full name: _____
Date of birth: _____
Social Security No.: _____
Citizen of USA: ___ Yes ___ No

3. Address: _____ City/State/Zip: _____
Telephone Number: (Home) _____
 Work: (Husband) _____ (Wife) _____
 Email: (Husband) _____ (Wife) _____

4a. S Corporation Stock : Do you own any stock in a Subchapter S Corporation?
 ___ Yes ___ No

4b. Community Property: Have you and your spouse at any time lived or owned assets in one of the following states: California, Arizona, Texas, Idaho, Nevada, New Mexico, Washington, Wisconsin, or Louisiana? ___ Yes ___ No

Pre- or Postnuptial Agreement. ___ Yes ___ No. If yes, please bring to appointment.

4c. Prior marriages? ___ Yes ___ No
Children by prior marriages? ___ Yes ___ No
Agreements with prior spouse? ___ Yes ___ No

5. Children and Grandchildren, if applicable:

<u>Name</u>	<u>Date of Birth</u>	<u>Relationship</u>	<u>Home Address</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

6. Proposed Personal Representative (formerly executor):

	<u>Name</u>	<u>Relationship</u>	<u>Address</u>
Primary:	_____	_____	_____
Alternate:	_____	_____	_____

7. Proposed Trustee (if any):

	<u>Name</u>	<u>Relationship</u>	<u>Address</u>
Primary:	_____	_____	_____
Alternate:	_____	_____	_____

8. Proposed Guardians of Minor Children:

	<u>Name</u>	<u>Relationship</u>	<u>Address</u>
Primary:	_____	_____	_____
Alternate:	_____	_____	_____

9. Remote Contingent Beneficiaries: If neither husband nor wife is living and none of your children or grandchildren are living, to whom or to what charities would you want your estate to pass:

Part III

Instructions for Completing Attached Draft Financial Statement

- A. Please round all dollar amounts to nearest thousand dollars.
- B. Below is a sample of how it is anticipated that dollar amounts will be completed in the various columns.
- C. The dollar value of property held as Joint Tenants with Right of Survivorship should be shown in the first numerical column. Any property owned as Tenants in Common between husband and wife should be reflected with $\frac{1}{2}$ the value under husband's column and the other $\frac{1}{2}$ under wife's column.

Description	Joint Tenants with Right of Survivorship	Husband's Individual Property	Wife's Individual Property	Total
A. Cash and Accounts: (Checking, Savings, CD's, notes or accounts receivable)				
Norwest Bank	11,000			11,000
Western National Bank		3,000	7,000	10,000
Schwab Money Market		3,000		3,000
World Savings			10,000	10,000

Part III - Financial Statement

DRAFT FINANCIAL STATEMENT

Date: _____

Description	Joint Tenants with Right of Survivorship	Husband's Individual Property	Wife's Individual Property	Total
A. Cash and Accounts: (Checking, Savings, CD's, notes or accounts receivable)	\$	\$	\$	\$
B. Investment - Stocks, Mutual Funds & Bonds: <i>(IRA's and Retirement Plans should be shown under Section I. on Page 8.)</i>	\$	\$	\$	\$

NOTE: This financial statement has been prepared for estate planning purposes only as of the date set forth on the first page hereof and should not be relied upon for any other purposes. This financial statement is a draft financial statement only which has been prepared based on information provided to Kraemer, Kendall & Benson, LLC by Clients. There has been no attempt to verify any of the above information. The values are estimates only provided by Clients.

Description	Joint Tenants with Right of Survivorship	Husband's Individual Property	Wife's Individual Property	Total
C. Real Estate: (Market Value)	\$	\$	\$	\$
D. Closely Held Businesses: (Bring in last balance sheet and P&L statement, tax returns, buy-sell agreements, etc.)	\$	\$	\$	\$
E. Tangible Personal Property: (furniture, automobiles, art objects, personal effects, etc.)	\$	\$	\$	\$

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Description	Joint Tenants with Right of Survivorship	Husband's Individual Property	Wife's Individual Property	Total
F. Other:	\$	\$	\$	\$
CUMULATIVE SUBTOTAL				
G. Less Liabilities: Real Estate Mortgages Notes to Bank Taxes 	\$ 	\$ 	\$ 	\$
NET CUMULATIVE SUBTOTAL				
H. LIFE INSURANCE: (Total Death Benefit from next page)	\$	\$	\$	\$
CUMULATIVE SUBTOTAL				
I. Retirement Plans: (bring in last statement, descriptive booklet and beneficiary designations)	\$	\$	\$	\$
GRAND TOTAL				

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LIFE INSURANCE on Your Life								
Company	Type of Policy	Death Benefit	Insured	Owner	Beneficiary	Conting. Benefic.	CSV	Loans against Policy
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
TOTAL								

LIFE INSURANCE on Spouse's Life								
Company	Type of Policy	Death Benefit	Insured	Owner	Beneficiary	Conting. Benefic.	CSV	Loans against Policy
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
TOTAL								

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