

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. Address: _____ City/State/Zip: _____

Telephone Number: (Home) _____

Work: _____

Email: _____

3a. S Corporation Stock : Do you own any stock in a Subchapter S Corporation?

 ___ Yes ___ No

3b. Prior marriages? ___ Yes ___ No

Children by prior marriages? ___ Yes ___ No

Agreements with prior spouse? ___ Yes ___ No

4. Children and Grandchildren, if applicable:

Name Date of Birth Relationship Home Address

5. Proposed Personal Representative (formerly executor):

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

6. Proposed Trustee (if any):

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

7. Proposed Guardians of Minor Children:

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

8. Remote Contingent Beneficiaries: If none of your children or grandchildren are living, to whom or to what charities would you want your estate to pass:

9. Advisors: Name Address

Accountant: _____

Financial Advisor: _____

Insurance Underwriter: _____

Principal Bank: _____

10. Expected Inheritance:

<u>From Whom</u>	<u>Dollar Amount</u>
_____	_____
_____	_____
_____	_____

11. Special situations: The following estate planning matters are of particular concern or interest:

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 any assets held as Joint Tenants with Right of Survivorship should be shown in the first numerical column. Any property owned as Tenants in Common should be shown in the second column, listing your ½ (or ⅓, as the case may be) of the assets overall value.

Description	Joint Tenants with Right of Survivorship	Tenancy in Common (No Right of Survivorship)	Individual Property Titled in Own Name	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	Tenancy in Common (No Right of Survivorship)	Individual Property Titled in Own Name	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	Tenancy in Common (No Right of Survivorship)	Individual Property Titled in Own Name	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	Tenancy in Common (No Right of Survivorship)	Individual Property Titled in Own Name	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								

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