

KEVIN B. SPAETH

RICE, SPAETH, SUMMERS & HEISSERER, L.C.

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CONFIDENTIAL ESTATE PLAN QUESTIONNAIRE

The following information is necessary in preparing your estate plan:

PERSONAL INFORMATION

NAME: _____
(include middle initial)

Social Security #: _____

SPOUSE: _____
(include middle initial)

Social Security #: _____

ADDRESS: _____

PHONE #: _____
(w/area code) (home) (cell) (work)

COUNTY OF RESIDENCE: _____

List names of children (including middle initial) spouses and grandchildren, and their city and state of residence. (If additional space is needed, please complete on reverse side.)

LIST OF ASSETS

1. Real Estate

Please complete the following information concerning the real estate you own at this time including the property address and an approximate value on each. **(NOTE: Please provide a copy of a deed or abstract for each tract listed.)**

Tract I: _____

Value: _____ Mortgage _____

Tract II: _____

Value: _____ Mortgage _____

Tract III: _____

Value: _____ Mortgage _____

Tract IV: _____

Value: _____ Mortgage _____

Tract V: _____

Value: _____ Mortgage _____

(If additional space is needed, please complete on reverse side.)

2. Bank Accounts

Please list all current bank accounts as follows:

<u>Banking Institution</u>	<u>Account #</u>	<u>Name on Account</u>	<u>Type of Account</u>	<u>Average Balance</u>

(If additional space is needed, please complete on reverse side.)

Name of contact at the bank (i.e. loan officer): _____

3. Life Insurance Policies / Annuities

Please provide the insurance information as indicated:

<u>Company Name and Address</u>	<u>Policy Number and Type</u>	<u>Insured's Name</u>	<u>Value</u>

(If additional space is needed, please complete on reverse side.)

4. Stocks / Bonds / Investment Accounts

Please provide the following:

<u>Company Name</u> <u>and Address</u>	<u>Name</u> <u>on Account</u>	<u># of Shares</u>	<u>Approximate Value</u>
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Name, address & phone number of financial advisor: _____

5. Business Interest

6. Miscellaneous

Please list all pertinent information concerning any additional assets you own at this time.

Vehicles: (Attached copy of Title) _____

Farm Equipment: (Attach itemized listing with values) _____

Jewelry, Furs etc: (Attach itemized listing with values) _____

Other: _____

(If additional space is needed, please complete on reverse side.)

GENERAL INFORMATION

Please list the individual(s) you prefer as Successor Trustee of your Trust:

1st Successor: _____

of (City/State): _____

2nd Successor: _____

of (City /State): _____

In the event you are survived by minor children, please list the individual(s) you wish as Guardians of such minor children:

1st Guardian: _____

of (City/State)_____

Successor Guardian: _____

of (City/State)_____

Name, address & phone number of person who prepares your tax return?

Please describe in your own words how you want your property distributed upon your death:
