

ADAMS and HOOK, CPA's, LLP
"Interpreters of Information"
 122 W. Virginia Avenue, Post Office Box 7
 Bessemer City, North Carolina 28016-0007
 web address: www.adams-hook.com

Telephone: Voice, 704-629-2211; Fax, 704-629-2212

ESTATE PLANNING QUESTIONNAIRE (Confidential)

FAMILY DATA:

	<u>SSN</u>	<u>DOB</u>	<u>US Citizen?</u>	<u>Health Status</u>
Primary Name (Husband)	_ - -	_ / _ /	_	_

	<u>Relationship</u>	<u>SSN</u>	<u>DOB</u>	<u>US Citizen?</u>	<u>Health Status</u>
Wife (Spouse's Name)	_ - -	_ / _ /	_	_	_

Address: Home _____
 Work _____

Resident of What State _____

Telephone Number (Home) () ____ - ____
 Telephone Number (Work) () ____ - ____ Ext.
 Telephone Number (Cellular) () ____ - ____
 Email address _____@_____

Marital Status: Single ___; Married ___; Divorced ___; Other (describe): _____
 If Married Please enter date: ___/___/___

<u>Children:</u>		
<u>Name</u>	<u>DOB</u>	<u>Address</u>
_____	_ / _ /	_____
_____	_ / _ /	_____
_____	_ / _ /	_____

<u>Grand Children:</u>		
<u>Name</u>	<u>DOB</u>	<u>Address</u>
_____	_ / _ /	_____
_____	_ / _ /	_____
_____	_ / _ /	_____

<u>Other Dependents:</u>		
<u>Name</u>	<u>DOB</u>	<u>Address</u>
_____	_ / _ /	_____
_____	_ / _ /	_____
_____	_ / _ /	_____

<u>Family Tree:</u>	<u>DOB</u>	<u>Address</u>	<u>Estate \$</u>	<u>Living</u>
Primary (Husband)				
Father' Name	_ / _ /	_____	\$ _____	Yes or No
Mother's Name	_ / _ /	_____	\$ _____	Yes or No

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<u>Wife (Spouse or Other)</u>	<u>DOB</u>	<u>Address</u>	<u>Estate \$</u>	<u>Living</u>
Father's Name	___/___/___	_____	\$ _____	Yes or No
Mother's Name	___/___/___	_____	\$ _____	Yes or No

Sibling details (only if no surviving children):
 Name(s) of Brother(s)/Sister(s)

_____	___/___/___	_____		Yes or No
_____	___/___/___	_____		Yes or No
_____	___/___/___	_____		Yes or No
_____	___/___/___	_____		Yes or No

Have you ever filed a 'Gift tax return'? If yes, give details

Have you ever created a trust or are you the beneficiary of any trust? If yes, give details

PERSONAL FINANCIAL STATEMENT DETAILS

Date: ___/___/___ **What asset percentage increase do you expect each year for each item?**

	<u>Joint</u>	<u>Husband</u>	<u>Wife</u>	<u>TOTAL</u>	<u>Annual</u>
Assets:	<u>Names</u>				<u>Increase</u>
Cash and Bank Accounts	\$ _____	\$ _____	\$ _____	\$ _____	_____ %
Notes, Accounts Receivable, Mortgages Receivable	_____	_____	_____	_____	_____ %
Bonds	_____	_____	_____	_____	_____ %
Stocks and Mutual Funds (Details Needed)	_____	_____	_____	_____	_____ %
Closely-Held Business Interests	_____	_____	_____	_____	_____ %
Real Estate (Details Needed)	_____	_____	_____	_____	_____ %
Insurance (Details Needed)	_____	_____	_____	_____	_____ %
Employee Benefits/Retirement Plans	_____	_____	_____	_____	_____ %
Miscellaneous (e.g. personal effects, collections, patents, trademarks, copyrights, etc.)	_____	_____	_____	_____	_____ %
Other (describe) _____	_____	_____	_____	_____	_____ %
Total Assets	\$ _____	\$ _____	\$ _____	\$ _____	

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	<u>Joint Names</u>	<u>Husband</u>	<u>Wife</u>	<u>TOTAL</u>
Liabilities:				
Real Estate Mortgages	\$ _____	\$ _____	\$ _____	\$ _____
Notes to Financial Institutions/Others	_____	_____	_____	_____
Loans on Insurance Policies	_____	_____	_____	_____
Other Obligations	_____	_____	_____	_____
Charitable Commitments	_____	_____	_____	_____
Tax Liabilities	_____	_____	_____	_____
 Total Liabilities	 \$ _____	 \$ _____	 \$ _____	 \$ _____
 Net Worth (Assets minus Liabilities)	 \$ _____	 \$ _____	 \$ _____	 \$ _____
 Details of Current Earnings/Income:				
Earned Income	\$ _____	\$ _____	\$ _____	\$ _____
Interest and Dividends	_____	_____	_____	_____
Capital Gains	_____	_____	_____	_____
Rental Income and K-1's	_____	_____	_____	_____
Other	_____	_____	_____	_____
 Current Expenses:				
Routine Living Expenses	\$ _____	\$ _____	\$ _____	\$ _____
Mortgages or Notes	_____	_____	_____	_____
Other Expenses	_____	_____	_____	_____
 <u>Net Available for Investment</u>	 \$ _____	 \$ _____	 \$ _____	 \$ _____

RETIREMENT PLANNING

What is your goal to have sufficient retirement income?

What do you want to leave to your spouse?

What do you want to leave to your children?

What do you want to happen if both spouses die simultaneously?

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Do you plan to make 'lifetime gifts'? Source? To Whom?

What about gifts to "Charities"? (Charitable Remainder Trusts?)

ESTATE PLAN ITEMS TO BE DECIDED:

Executor	Who: _____	Why: _____
Successor Executor	Who: _____	Why: _____
Trustee(s)	Who: _____	Why: _____
Successor Trustee(s)	Who: _____	Why: _____
Guardian(s) for minor children	Who: _____	Why: _____
Successor Guardian(s)	Who: _____	Why: _____

How do you really want to distribute your estate? (Suggestion: **Think about percentages**)

	<u>Outright</u>	<u>In Trust</u>	<u>If trust, what age to access</u>
			Example: 1/3 at age ____; 1/3 at age ____; 1/3 at age ____
To spouse	\$ ____ / ____ %	\$ ____ / ____ %	
To children	\$ ____ / ____ %	\$ ____ / ____ %	____ % at age ____; ____ % at age ____; ____ % at age ____.
	\$ ____ / ____ %	\$ ____ / ____ %	____ % at age ____; ____ % at age ____; ____ % at age ____.
	\$ ____ / ____ %	\$ ____ / ____ %	____ % at age ____; ____ % at age ____; ____ % at age ____.
To grandchildren	\$ ____ / ____ %	\$ ____ / ____ %	____ % at age ____; ____ % at age ____; ____ % at age ____.
	\$ ____ / ____ %	\$ ____ / ____ %	____ % at age ____; ____ % at age ____; ____ % at age ____.
	\$ ____ / ____ %	\$ ____ / ____ %	____ % at age ____; ____ % at age ____; ____ % at age ____.
To others	\$ ____ / ____ %	\$ ____ / ____ %	____ % at age ____; ____ % at age ____; ____ % at age ____.
	\$ ____ / ____ %	\$ ____ / ____ %	____ % at age ____; ____ % at age ____; ____ % at age ____.

Please list any other items you are concerned about. Your estate plan will be only as good as the information you furnish.

Feel free to use the back of pages, if necessary.