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*Licensed to practice in Maryland and
in the District of Columbia*

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

- All potential clients should complete **Parts A, B, C and D.**
 - If you feel some items do not apply to you, or have questions regarding same, just leave the item blank.
 - *Whom may we thank for referring you?* _____
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PART A. PERSONAL AND FAMILY DATA

Name: _____ Date (mm/dd/yyyy): _____
Home Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
Home e-mail: _____
Year Maryland or DC
Residence Established: _____
Profession/Your title _____
Citizenship: _____
Date of Birth _____

Names of Siblings:

Name	Address
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_____	_____
_____	_____
_____	_____

Names of Children (Please also include the names of any children who are deceased):

Name	Address
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_____	_____
_____	_____

Names of any grandchildren:

Name	Address

Do you have a Safe Deposit Box: _____

If yes, who has access to the Safe Deposit Box?

Do you have a will or have you had a will prepared in the past? Yes No

Do you have any health conditions that may affect your decision-making? If so, please describe.

PART B. WILL PROVISIONS DESIRED BY CLIENT

1. Do you have any special wishes regarding your funeral or burial (e.g., cremation)?

2. Choosing a Personal Representative

You will be asked to choose a Personal Representative (aka "P.R." or known in other states as an Executor or Executrix) to serve as the person who will deal with your property upon your death. This person should be:

- Over 18 years of age;
- Mentally competent;
- Never been convicted of a serious crime.
- A U.S. Citizen, OR a Legal Permanent Resident AND a relative

Your Personal Representative (P.R.) may be a resident of another state, but a qualified in-state resident would still have to be appointed for service of process. Your P.R. should be mature, honest and financially secure. It is preferable if the individual chosen is younger than you, but not mandatory. It is also prudent to name at least one successor personal representative ("Contingent P.R.") in case the person whom you name first is unable or unwilling to serve in the future.

First Choice
Personal
Representative.

Successor
(Contingent)
Personal
Representative.

3. Bequeathing Property; General Disposition Intentions:

Use full legal names, including any middle names, as they appear on the named individual's birth certificate. You can bequeath your property in total, such as "...all my personal and real property...", or you can make special bequests such as, "I give my antique jewelry to my niece, Jane Smith." However, it is important to fully identify the property you wish to leave to someone. You can also divide your property into shares such as, "sixty percent to my sister, Jane Smith, and twenty percent to each of my niece and nephew, Mary Smith and Robert Smith."

Specific Bequests

Gifts you wish to pass to individuals before the bulk of your property, for example, a gift of family jewelry, artwork, or cash to an individual.

To: _____

To: _____

To: _____

Disposition of Residue

The remainder of your estate (after specific bequests)

To: _____

To: _____

To: _____

4. Minor Children and Young Adults as Beneficiaries

Where minor children, or even young adults are named as legatees in the Will, it is recommended that a Testamentary Trust be established in the Will for their benefit. A Testamentary Trust clause is language that is added to the Will in the event that certain conditions exist at the time of your death and you wish to protect the distribution of your estate by having it distributed at a specific time or during specific time events. A Trustee would oversee this potential trust and he or she should be mature, trustworthy, and financially secure. (This Trustee may, but need not be, the same individual as the Guardian or Personal Representative). However, as a Trustee, the individual chosen should also have some experience in handling money. Again, it would be wise to name a second person if the first named Trustee is unable or unwilling to serve.

5. Trust Terms

If you wish to establish a Testamentary Trust, you also must decide at what age the beneficiary of the Trust may receive the principal (corpus) of the Trust, and when the Trust is to be terminated. For large

amounts, we generally recommend one-third distribution at ages 25, 30, and 35, but this is entirely discretionary with you. Where there are extenuating circumstances, such as a beneficiary with a disability, special arrangements must be made.

Trustees for Testamentary Trust

Trustee(s) _____
 Successor
 Trustee(s) _____

7. Have you made or do you plan on making future gifts in excess of Seventeen Thousand Dollars (\$18,000.00) to one person in any one year?

Yes No

Do you wish to make bequests to a religious organization or other charitable organization?

Yes No

If yes, please list the organizations and provide their locations or addresses

8. ***“Ultimate Tragedy” Distribution. To whom would you leave your property if you and your entire family—i.e., all your descendants—were lost in a common disaster? Although this situation is highly unlikely, it is still worth considering. Some examples might include: charity/church/ministry; extended family (siblings, nieces, nephews); other specified individuals, or among a group of people (such as “divide equally among the children of my friend Jane Adams.”***

Percentage/\$ Amount	Legatee	Address	Relation

9. Do you have more than \$50,000 in assets in any non-U.S. banks or financial institutions?

PART C. POWERS OF ATTORNEY

Powers of Attorney are often used to authorize someone to act for you under certain legal conditions, especially legal incapacitation. We recommend that you consider executing such power. Whom would you like to name as your agent (and Successor agent) under such power? There are two types of such power — a “Durable General Power of Attorney” and a “Durable Health Care Power of Attorney.” The first power of attorney appoints an agent to act for you in connection with financial matters and to manage assets while the Health Care Power appoints an agent to make health care decisions for you in the event of incapacity.

1. Durable General Power of Attorney (for financial decision making)

Name of Attorney-in-Fact _____
 Address and Telephone Number _____
 Relationship to you: _____
 Successor Attorney-in-Fact _____
 Address and Telephone Number _____
 Relationship to you: _____

2. Durable Health Care Power of Attorney (for medical decisions)

Name of Agent (Attorney –in
Fact) _____
 Address: _____
 Relationship to you: _____
 Successor Agent (Attorney-in-
Fact) _____
 Address: _____
 Relationship to you: _____

PART D. ASSET INFORMATION

1. Do you:

	Yes	No
a) Expect to inherit something from parents or others?	<input type="checkbox"/>	<input type="checkbox"/>
(b) Expect to receive benefits from a retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
(c) Have powers of appointment?	<input type="checkbox"/>	<input type="checkbox"/>
(d) Expect to receive gifts from parents or others?	<input type="checkbox"/>	<input type="checkbox"/>
(e) Have beneficial interests in trusts?	<input type="checkbox"/>	<input type="checkbox"/>
(f) Have an interest in a business Buy-Sell Agreement?	<input type="checkbox"/>	<input type="checkbox"/>

Other : _____

2. Real Estate:

Location and Type	Current Market Value	Cost Basis (Purchase Price)	How Is Title Held? (Joint/Sole by Whom)

3. Insurance:

Company and Policy Number	Death Benefit	Approx. Cash Value	Person Insured	Owner	Beneficiary

4. Cash Accounts:

Institution	Approximate Balance	In Whose Name(s)?

5. Securities/Mutual Funds:

Company	No. of Shares	Orig. Cost	Approx. Market Value	Date of Purchase	In Whose Name?

6. Approximate Values of Personal Property (vehicles, jewelry, art, collections, other household goods):

Description	Original Cost	Appx. Fair Market Value

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7. Notes, Retirement Plans, and Other Assets:

Description	Value

8. Mortgages and Debts:

Type and to Whom Owed	Amount

9. Anything Else You Would Like Us To Consider?