

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

DATE: _____

How did you find us? _____



IF YOU ARE A HYATT/METLIFE LEGAL PLAN MEMBER, PLEASE PROVIDE:

Member number (assigned number or last 4 digits of your social security number): _____

Case Number: _____



IF YOU ARE AN ARAG MEMBER, PLEASE PROVIDE:

Please provide or create a Case ID Number for "Will": _____

Please provide or create a Case ID Number for "Revocable Trust": _____

Please then contact ARAG to assign the above Case ID Numbers to Attorney ID: 8602-5266-9630

DOCUMENTS WILL BE DRAFTED USING THE NAMES AS THEY ARE SPELLED BELOW.

WHAT WOULD YOU LIKE TO NAME YOUR LIVING TRUST?

- Example: Harold West and Jane West are married. They decided to call it the "West Revocable Trust."
- Example: John Smith and Rachel Walters are married with different last names, and they decided to call it the "Smith-Walters Revocable Trust".

Note: For privacy reasons, you can name it whatever you want: "_____ Revocable Trust".

YOUR FULL LEGAL NAME: _____

Gender: _____ Place of Birth: _____ Citizenship: _____

Personal e-mail: _____

Marital Status (single, married, divorced, widow/widower, etc.): _____

Do you have any other children (living or deceased) other than those listed in the below table on p.2?

If so, please provide the details: _____

HOME ADDRESS: _____

Home Phone: _____

Personal e-mail: _____

SPOUSE/PARTNER'S FULL LEGAL NAME: _____

Gender: _____ Place of Birth: _____ Citizenship: _____

Personal e-mail: _____

Marital Status (single, married, divorced, widow/widower, etc.): _____

Do you have any other children (living or deceased) other than those listed in the below table on p.2?

If so, please provide the details: _____

CHILDREN D.O.B. GENDER MARITAL STATUS Mark "X" if Adopted

I. PERSONAL ASSETS (YOUR "ESTATE")



REAL PROPERTY (Note: Please provide us with your grant deed for any residential property in the U.S.).

ADDRESS

TITLING (joint tenancy, community property, etc.)

BANK ACCOUNTS

BANK NAME

ACCT. NO.
xxxx - (last 4 digits)

TITLE (whose name(s) is the account under?)

BROKERAGE ACCOUNTS

NAME

ACCT. NO.
xxxx - (last 4 digits)

TITLE (whose name(s) is the account under?)

RETIREMENT (Note: Retirement assets aren't a part of your estate plan as you should have a beneficiary and backup beneficiary, but this is for reference purposes.)

PARTICIPANT	PLAN TYPE (IRA, 401K, etc.)	ACCT. BAL.	BENEFICIARY

BUSINESS INTERESTS, PARTNERSHIPS, ETC. (Please describe and give estimated value.)

--

LIFE INSURANCE (Note: Life insurance is usually not a part of your estate plan, but we ask for reference purposes.)

OWNER (and the Company issuing it)	INSURED	FACE AMOUNT	BENEFICIARY

OTHER ASSETS (i.e., jewelry, cars, anything tangible of significant value worth noting. Even if you don't list it, it is OK. It will be a part of your estate plan with the "pour over" will.)

DESCRIPTION	ESTIMATED VALUE

APPROXIMATE ESTATE VALUE

Besides the below listed assets, do you have, or do you expect to have assets close to \$11.7M per person or combined \$23.4M as a married couple in your lifetime(s)? YES NO

- Retirement accounts—IRAs or 401(k)s, for example—for which a beneficiary was named.
- Life insurance proceeds (unless the estate is named as beneficiary, which is rare)
- Property held in a living trust.
- Funds in a payable-on-death (POD) bank account.

II. FIDUCIARIES

Name the person(s) you wish to act in the following capacities:

*the same parties should be named as both executor and trustee to simplify post death administration unless the client has a specific reason to choose different persons.

Note: If you are married, these roles (Executor, Trustee, Guardian, any backups, etc.)

******CANNOT BE YOUR SPOUSE AND/OR MINOR CHILDREN UNDER 18.**

All of these roles can always be changed by a future amendment; they aren't set in stone and can always be changed. Please choose people from the U.S., preferably US citizens or at least permanent residents as there could be tax consequences.

Example: If you have a minor, once they turn 18, you can later update and change him/her to executor and trustee.

EXECUTOR: _____

(The person who, upon your death, will be responsible for gathering, liquidating, distributing assets; paying any debts, taxes and expenses, as a result of probate.)

EXECUTOR'S ADDRESS: _____

EXECUTOR'S TELEPHONE NUMBER: _____

BACKUP EXECUTOR: _____

BACKUP EXECUTOR'S ADDRESS: _____

BACKUP EXECUTOR'S TELEPHONE NUMBER: _____

TRUSTEE: _____

(The person(s)/entity you wish to act as successor Trustee of your Trust to hold, administer and distribute Trust property for the benefit of your beneficiaries.)

TRUSTEE'S ADDRESS: _____

TRUSTEE'S TELEPHONE NUMBER: _____

BACKUP TRUSTEE: _____

BACKUP TRUSTEE'S ADDRESS: _____

BACKUP TRUSTEE'S TELEPHONE NUMBER: _____

GUARDIAN OF CHILDREN: _____

(The person(s) with whom your minor children would reside.)

BACKUP GUARDIAN OF CHILDREN: _____

GUARDIAN OF CHILDREN'S ESTATE: _____

(The person who has legal authority/duty to care for your minor children's financial matters.)

BACKUP GUARDIAN OF CHILDREN'S ESTATE: _____

III. DISPOSITION



Name the person(s) or charities that you want to receive your estate after your death:

**INDIVIDUALS OR:
CLASSES OF INDIVIDUALS**
(i.e. your children or grandchildren)

SHARE OF ESTATE
(can be equal shares, percentage or \$ value)

Do you wish to make any Special gifts of cash or other assets to any person or charity? If so, who?

Name: _____
Address: _____
Relationship: _____
Gift: _____

Name: _____
Address: _____
Relationship: _____
Gift: _____

Name: _____
Address: _____
Relationship: _____
Gift: _____

Name: _____
Address: _____
Relationship: _____
Gift: _____

DO YOU WANT TO HOLD ANY GIFTS IN TRUST FOR YOUR BENEFICIARIES UNTIL THEY REACH A PARTICULAR AGE? If so, please identify the age: _____

IF YOU HAVE CHILDREN AND ONE OF YOUR CHILDREN PREDECEASES YOU, HOW DO YOU WANT THEIR SHARE TO PASS? (Please mark an "X")

- _____ To their children (or grandchildren)
- _____ To their spouse (if applicable)
- _____ To your remaining children
- _____ Other: _____

IV. OTHER INFORMATION/ADDITIONAL ASSETS

Please provide any other information or concerns, whether personal or financial, of which we should be aware of: