

LAW OFFICES OF CHARLES P. KINCANNON

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

1. Husband's Full Name: _____ Birthdate: _____

2. Husband's Signature Name: _____

3. Wife's Full Name: _____ Birthdate: _____

4. Wife's Signature Name: _____

5. Address: _____ Home Phone: _____

_____ Work Phone: _____

County: _____ U.S. Citizen: Husband _____ Wife _____

6. Social Security No.: (Husband) _____ (Wife) _____

7. Children: Please indicate if children are from a previous marriage.

Full Name	Birthdate	Current Residence
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A. _____

B. _____

C. _____

8. Have you or your spouse been previously married? Husband _____ Wife _____

9. Date of Current Marriage: _____

10. Do either husband or wife have any of the following? (Please indicate Yes or No)

. Will: Husband _____ Dated _____ Wife _____ Dated _____

Trust: Husband _____ Dated _____ Wife _____ Dated _____

11. Please give the names of two people to administer your Estate in the event of your death?

A. Name _____ City and State _____

B. Name _____ City and State _____

12. Please indicate the best phone number and time of day to contact you to schedule an appointment.

FINANCIAL INFORMATION

	Address/Description	How Title Held	Market Value
13. Real Property	a. _____	_____	\$ _____
	b. _____	_____	\$ _____
	c. _____	_____	\$ _____
14. Secured Notes:	_____		\$ _____
15. Investments:	How is ownership held?		
a. Limited Partnerships	Joint _____	Separate _____	\$ _____
b. Cash accounts	Joint _____	Separate _____	\$ _____
	Joint _____	Separate _____	\$ _____
c. Stocks, bonds	Joint _____	Separate _____	\$ _____
			\$ _____
16. Current Value of:			
a. Retirement Plans	Husband _____		\$ _____
	Wife _____		\$ _____
b. Tax sheltered annuities	Joint _____	Separate _____	\$ _____
17. If you own your own business indicate type, value, and owner:			
	Sole Proprietor _____	Partnership _____	Corporation _____
			\$ _____
18. Life Insurance: (Indicate death benefit)			
	Company	Owner of Policy	Beneficiary
a.	_____	_____	_____
			\$ _____
b.	_____	_____	_____
			\$ _____
19. Please estimate the value of your personal effects			\$ _____
20. Please add up items 13 through 19. This equals your Gross Estate.			\$ _____
21. Please indicate your total debt (including mortgage)			\$ _____
22. Subtract item 21 from item 20 to get your Net Taxable Estate			\$ _____
Note: This figure will be used to determine your potential estate tax.			
23. Please state your approximate annual income.			\$ _____
(Used for purposes of analyzing future needs)			

If you have any questions, please call (770)-951-7033