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Estate Planning Questionnaire

Please take a few minutes to answer the following questions. Email, mail or fax the completed form back to us. Your answers will enable us to consider the facts of your case and to provide you with a FREE consultation. This information is confidential and will not be shared with any other parties.

• Name and address (including your spouse): _____

• Phone number and e-mail address: _____

• Are you and your spouse (if any) over age 60? Yes No

• Do you have children? Yes No What are their ages? _____

• Do you own your residence? Yes No Please provide the approximate value of your home and remaining amounts owed on your mortgage(s). _____

• Please list below the approximate amount of assets that you own:

Bank and Investment Accounts: _____

Retirement Accounts: _____

Life Insurance Policies (Are they term or whole life?): _____

• Do you own any vacation or other rental properties? Yes No If so, please give an approximate value and the amount of outstanding mortgage(s) (if any):

• Additional questions or comments:
