

FAMILY FINANCIAL QUESTIONNAIRE

This Questionnaire should help your family with transferring assets and coping with financial matters after your death.

I. Estate Plan Information

A. Wills and Trusts

1. Location of Original Will (and Codicils), Personal Effects Memo, and Trust Agreements:

2. Fiduciaries named in Will or revocable trust:

- a. Personal Representative (name, address and phone):

- b. Guardian of children (name, address and phone):

- c. Trustee (name, address and phone):

- B. Financial Power of Attorney: Agent (name, address and phone):

Location of original: _____

C. Medical Power of Attorney: Agent (name, address and phone):

Location of original: _____

D. Living Will:

Location of original: _____

E. Organ Donor Card: _____

F. Wishes for burial/Disposition of Last Remains form: _____

Location of original: _____

G. Are you a Trustee of any trusts? Describe and give name and address of Successor Trustee: _____

II. Personal Information

A. Family Members

<u>Name</u>	<u>Relationship</u>	<u>Address</u>	<u>Birth Date</u>	<u>SS#</u>
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<u>Name</u>	<u>Relationship</u>	<u>Address</u>	<u>Birth Date</u>	<u>SS#</u>
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B. Are you a veteran? Yes _____ No _____

If yes, list branch of service and date of discharge:

C. E-mail accounts with passwords: _____

D. Did you sign and record a Designated Beneficiary Agreement? _____

If so, in what county? _____

E. Do you have any frozen embryos, sperm or eggs that could be used in assisted reproduction techniques? _____

Is so, where are they stored? _____

III. Advisors (name, address, e-mail and phone)

A. Accountant: _____

B. Attorney: _____

C. Insurance Agent: _____

D. Financial Planner: _____

E. Investment Advisor: _____

IV. Asset Information

A. Attach a list of assets and liabilities, or fill out the following schedules. Indicate where original policies and other information is kept. Also indicate electronic billing, banking and investment accounts with usernames and passwords.

B. Insurance/Annuities

1. Location of policies: _____

2. List of policies:

<u>Insured</u>	<u>Owner</u>	<u>Beneficiary</u>	<u>Company</u>	<u>Face Amount</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

C. Real Property, Oil and Gas Interests, Timeshares

1. Location of Deeds, Leases, Division Orders: _____

2. List of Properties:

<u>Owner</u>	<u>Address of Property</u>	<u>Mortgage Company</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

3. Tenants of the above properties:

<u>Name</u>	<u>Address</u>	<u>Lease End</u>	<u>Rental</u>
_____	_____	_____	_____
_____	_____	_____	_____

D. Partnership Interests/Limited Liability Companies

1. Location of Agreements: _____

2. List of Interests:

<u>Name of Partnership/Company</u>	<u>% Interest</u>	<u>Person to Contact at Your Death</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

E. Securities

1. Investment accounts (company and account numbers):

2. Closely held corporations:

<u>Name of Company</u>	<u>No. of Shares</u>	<u>Person to Contact at Your Death</u>
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3. Original stock certificates, bearer bonds, savings bonds

Location of certificates: _____

List: _____

F. Bank Accounts

<u>Bank</u>	<u>Owner</u>	<u>Number</u>	<u>Amount</u>
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G. Employee Benefits

1. Person to contact at place of employment: _____

2. Benefits at company:

Life Insurance _____ Salary Benefit _____

Pension _____ Profit Sharing _____

Stock account _____

H. Individual Retirement Accounts

<u>Bank or Company</u>	<u>Beneficiary</u>	<u>Amount</u>

I. Miscellaneous

1. Collections: art, coin, etc. (Describe and list person to contact for valuation/sale): _____

2. Vehicles: Location of titles: _____

3. Jewelry, furs, silver: Location of appraisals, if any; person to contact for valuation: _____

4. Are you a beneficiary of any trusts: (Describe and give name and address of Trustee): _____

5. Safe Deposit Box (Name of Bank, box number, location of key): _____

6. Persons with access to Safe Deposit Box: (Include name, address & phone number): _____

7. Firearms: location, type _____

8. E-bills usually received (list companies): _____

9. E-statements usually received (list banks, investment companies, others):

10. Digital assets (photos, bitcoin, other): _____
