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Date

**MARRIED COUPLE
 ESTATE PLANNING
 WILL INFORMATION – CONFIDENTIAL**

Please submit the questionnaire by 5pm the day before your scheduled consultation.

Note: Information provided is held in complete confidence and is used for the sole purpose of analyzing estate-planning needs and designing estate-planning documents. Full Legal Names for individuals and businesses are required in all instances where a name is requested.

General Information	Husband	Wife
Full Legal Name		
Name you prefer to be called		
Home Address		
County of Residence		
Citizenship		
Employer		
Occupation		
Business Address		
Preferred Mailing Address		
Home/Mobile Telephone		
Business Telephone		
Email Address		
Date of Birth		

Children's Names & Dates of Birth (if applicable)				
Grandchildren's Names & Dates of Birth (if applicable)				
Do you currently have a will?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Do you currently have a trust?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Are you interested in information about irrevocable life insurance trusts, or ILITs?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Are you interested in information about companion animal trusts?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Are you interested in information about stand by special needs trusts?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Do you need to schedule an appointment with Paige to have your documents signed and notarized? This is a free service, which requires you to bring two impartial witnesses to the appointment.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
Were there previous marriages? If yes, please enter year marriage(s) ended.				
What is your primary motivation for considering estate planning?	<input type="radio"/> Probate Avoidance <input type="radio"/> Guardianship of Minor Children <input type="radio"/> Business Planning <input type="radio"/> Federal Estate Tax Planning <input type="radio"/> Other		<input type="radio"/> Probate Avoidance <input type="radio"/> Guardianship of Minor Children <input type="radio"/> Business Planning <input type="radio"/> Federal Estate Tax Planning <input type="radio"/> Other	

How soon would you like to complete planning? Is there a specific deadline, such as an upcoming trip, surgical procedure, etcetera?		
Do any of your children or other beneficiaries have disabilities? Please explain.		
Are any of your children from a previous relationship? Please list child's name and biological parent and any other pertinent circumstances.		
Do you or any family member of potential beneficiaries have serious health problems? If yes, please explain, or type "N/A."		
Do you own a long-term care insurance policy? If yes, please elaborate, or type "N/A."		
Have gift tax returns ever been filed to report gifts made? If yes, please provide copies.	<input type="radio"/> Copies Attached	<input type="radio"/> No gift tax returns have been filed
How did you learn about The Law Office of Paige Arden Stanley?		
Our office publishes a short, educational newsletter 6 times annually. Would you like to receive it?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

PROPERTY DISTRIBUTION

HUSBAND	WIFE
If your spouse and children survive you, how would you like to leave your property? Please specify to whom and how, outright or in trust.	
If your spouse predeceases you (or if you both die at the same time) but children survive you, how would you like to leave your property? If you would like to set up a trust for your children in any event, at which ages would you like the trust to be finally distributed to them (for example, 1/3 at 25, 1/3 at 30 and 1/3 at 35)?	
If your spouse and all of your children predecease you, how would you like to leave your property? Keep in mind that the Will of the second to die will control; therefore, it would be advisable to have the same designation in both Wills).	
Please designate charitable bequests. If not applicable, please type "N/A."	
Please list any specific bequests of cash or personal property. If not applicable, please type "N/A."	
Consider and explain if you would like to provide for the distribution of your property if neither you, your spouse, nor your children or other beneficiaries named above survive.	
Consider if you do not want an heir to inherit property. If so, please explain why.	

EXECUTORS, TRUSTEES and GUARDIANS (A glossary is attached for your convenience.)

HUSBAND	WIFE
<p>Who would you like to serve as executor or co-executors? <i>For each, please list full legal name, address and phone numbers.</i></p>	
<p>Who would you like to serve as successor executor or co-executors? <i>For each, please list full legal name, address and phone numbers.</i></p>	
<p>Who would you like to serve as trustee or co-trustees? <i>For each, please list full legal name, address and phone numbers.</i></p>	
<p>Who would you like to serve as successor trustee or co-trustees? <i>For each, please list full legal name, address and phone numbers.</i></p>	
<p>Who would you like to serve as guardian of any of your children who are under the age of 18 in the event your spouse predeceases you? <i>For each, please list full legal name, address and phone numbers.</i></p>	
<p>Who would you like to serve as successor guardian? <i>For each, please list full legal name, address and phone numbers.</i></p>	

ADDITIONAL QUESTIONS (A glossary is attached for your convenience.)

HUSBAND	WIFE
Would you prefer to be buried or cremated?	
<input type="radio"/> Buried <input type="radio"/> Cremated	<input type="radio"/> Buried <input type="radio"/> Cremated
With a Georgia Advance Healthcare Directive, who should be named to make medical decisions on your behalf, including decisions regarding medical consents, life support issues, and nursing home admission, if you were unable to make these decisions yourself? Please list your agent(s) and successor agent(s). YOU MUST SUPPLY FULL LEGAL NAMES, ADDRESSES AND PHONE NUMBERS.	
Agent Name	Agent Name
Address/Phone	Address/Phone
Successor Name	Successor Name
Address/Phone	Address/Phone
In a Financial Power of Attorney, you name someone to act on your behalf with respect to the financial/business side of your life (banking, property, insurance, etc.). As you are giving someone authority to act on your behalf, the person(s) you name as your Agent/Attorney in Fact must be someone in whom you have the greatest trust and confidence. Please list your agent(s) and successor agent(s). YOU MUST SUPPLY FULL LEGAL NAMES, ADDRESSES AND PHONE NUMBERS.	
Agent Name	Agent Name
Address/Phone	Address/Phone
Successor Name	Successor Name
Address/Phone	Address/Phone
Are there any particular considerations in planning your estate such as restrictions or insurance requirements in divorce decrees? If so, please explain.	

FINANCIAL INFORMATION (Estimated)

ASSETS	HUSBAND	WIFE
Retirement Plans and other Employee Benefits		
Please give the name and address of the employee benefits coordinator, plan administrator or other appropriate persons to obtain information about your retirement plans, employee benefits or deferred compensations.		
If you receive annual statements of your retirement and other employee benefits from your employer, please attach the most recent statement from your employer.	<input type="radio"/> I do not receive statements <input type="radio"/> Attached	<input type="radio"/> I do not receive statements <input type="radio"/> Attached
Do you have Individual Retirement Accounts (IRAs)?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
If yes, please indicate location(s) and balance(s).		
If you own a business, do you have an Employee Stock Ownership Plan (ESOP)? If so, what is the dollar value?	\$	\$
Home and Personal Property		
Do you own outright, rent or have a mortgage on your residence?	<input type="radio"/> Rent <input type="radio"/> Own <input type="radio"/> Mortgage	<input type="radio"/> Rent <input type="radio"/> Own <input type="radio"/> Mortgage
Is the home in the wife's name, the husband's name or in both names? If jointly owned, please review the deed to determine whether it reads tenants in common or joint tenancy with right of survivorship. It is highly recommended to bring a copy of the deed to our meeting.	<input type="radio"/> Wife's Name <input type="radio"/> Husband's Name	<input type="radio"/> Tenants in Common <input type="radio"/> Joint with Right of Survivorship
Please provide the net value of the home. <i>Fair market value minus mortgage or other home equity loan</i>	\$	
Please estimate the value of all personal property (i.e., car, jewelry, art, silver, furniture, clothing), excluding any investment collectibles set forth below.	\$	\$
Investments : Please indicate the amount of the following, if applicable.		
Cash and other liquid assets	\$	\$
Stocks and Bonds	\$	\$
Mutual Funds	\$	\$
Investment Real Estate	\$	\$

Collectibles	\$	\$
Limited Partnerships (oil and gas, real estate, others)	\$	\$
Notes Receivable Amounts	\$	\$
Life Insurance		
Please indicate total net value of all death benefits from life insurance policies on the life of each of you (excluding any accidental death). <i>The attached chart may be helpful.</i>	\$	\$
Total Assets	\$	\$
Liabilities		
Please list all liabilities such as outstanding loans and pledges. Do not list home mortgages listed above (or home equity loans secured by your home), and exclude life insurance loans subtracted from the net death benefits listed above.		
Total Liabilities	\$	\$
Total Net Estate Value	\$	\$
Business Interests (Skip to Additional Questions if not applicable.)		
Do you own a business that serves as your primary source of income?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of Business		
Nature of Business		
In what legal form is your business conducted (i.e. proprietorship, corporation, professional corporation, partnership, limited liability company)?		
Are there other members or shareholders? If yes, please explain, including full legal names and % of ownership, or type "NA."		
Have you or do you anticipate that you will elect Subchapter S status for income tax purposes?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Do you have a shareholder's agreement, buy/sell agreement, partnership agreement or operating agreement, which provides for the disposition of a member's or shareholder's interest at death? <i>If you have one, please bring a copy of the agreement to our meeting.</i>	<input type="radio"/> Agreement Attached <input type="radio"/> Not Available <input type="radio"/> Not Applicable	<input type="radio"/> Agreement Attached <input type="radio"/> Not Available <input type="radio"/> Not Applicable

What restrictions, if any, are there on your interest in the business?		
What percentage of the business do you own?		
What is the \$ value of your interest in the business, and which valuation method was used?		
Additional Questions		
If you own a vacation home or other property in another state, or plan to move to another state, please indicate the state or states.		
During your marriage, have you ever lived in Texas, California, Arizona, Nevada, Idaho, Louisiana, New Mexico, Wisconsin or the State of Washington?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Are either of you or your children likely to receive an inheritance? If yes, please explain (in trust or outright and potential amount).		
Have you ever made a gift of over \$14,000 and/or filed gift tax returns in any year? <i>Please provide copies of returns, if possible.</i>	<input type="radio"/> Attached	<input type="radio"/> Not Available
Are you the grantor or beneficiary of, or do either of you expect to be the beneficiary of a trust or trusts? If so, do you possess any power of appointment over any of the trust property? <i>If yes, please explain below.</i>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

DOCUMENT LOCATIONS AND RESOURCE CONTACT INFORMATION

Note: Please advise Paige if you'd like a referral for any of these service categories.

Accountant Name and Company	
Name Address	
Phone	
Insurance Agent Name and Company	
Name Address	
Phone	
Financial Planner and Company	
Name Address	
Phone	
Employer Benefits Coordinator	
Name Address	
Phone	
Address of Safe Deposit Box Location & Box Number	
Location of Other Important Documents	
Will	
Insurance Policies	
Notes, Deed, Divorce Decrees	
Other :	
Other :	
Other :	

GLOSSARY OF ESTATE PLANNING TERMINOLOGY

ADMINISTRATOR	The person who administers a decedent's estate when there is no will.
ADMINISTRATOR WITH WILL ANNEXED	The person, other than an Executor, who administers a decedent's estate when there is a Will, but the Will fails to name an Executor or the named Executor cannot or will not serve.
CODICIL	An amendment or change made to an existing will. A codicil must be properly drafted, executed and witnessed just like an original will in order to be valid.
DECEDENT	The deceased person.
ESTATE	All assets owned by an individual at the time of death. The “probate estate” consists of all assets in your name, which pass under your Will. The “taxable estate” includes most of the probate assets as well as life insurance, jointly owned property, benefits payable through deferred compensation plans and other assets passing outside of the probate estate.
EXECUTOR/EXECUTRIX	The individual or bank (or any combination) named in your Will to collect, preserve and distribute your estate.
GEORGIA ADVANCE DIRECTIVE FOR HEALTHCARE	A document primarily designating an agent or agents to make health care decisions for you should you become incapable of doing so on your own behalf.
GUARDIAN	The person named in a will to take legal custody of minor children is the guardian. If you are divorced, the surviving natural parent has the first legal right to custody of minor children. You can, however, appoint someone else to manage the property of your children, (i.e., a conservator). Because guardians and conservators may be subject to cumbersome reporting to the Court, it is usually preferable to create a trust for minor children.
HEIRS	Those persons who would inherit the estate of a decedent if there were no Will under the rules of descent and distribution. "Heir" does not mean the same thing as "beneficiary," although an heir may also be a beneficiary.
INTESTATE	When an individual dies without a Will.
IRREVOCABLE LIFE INSURANCE TRUST (ILIT)	An ILIT is a type of irrevocable trust that is specifically designed to hold and own life insurance policies. Once the ILIT has been set up, you will transfer ownership of your life insurance policy(ies) to the Trustee of the ILIT. While you can't be a Trustee of the ILIT (otherwise you'll be deemed to have incidents of ownership in the life insurance), once you've transferred ownership of the life insurance to the Trustee of the ILIT, you'll no longer own the policies, and the proceeds can't be taxed in your estate when you die.
JOINT OWNERSHIP	When more than one person holds legal title to property. There are two forms in Georgia: “joint tenancy with right of survivorship” and “tenants in common.” Each form produces different results in your estate and should be reviewed carefully. The deed to real property will indicate the form of ownership.
LETTERS TESTAMENTARY / LETTERS OF ADMINISTRATION	The official document issued by the Probate Court evidencing the authority of an executor or an administrator.

PERSONAL REPRESENTATIVE	Any executor, administrator, guardian or trustee, but not a temporary administrator.
PROBATE	The court procedure by which a Will is proved to be the valid last Will of a decedent; probate is also used generically to refer to the legal process of administering a decedent's estate.
PROBATE COURT	The Court having jurisdiction over proceedings to administer the estate of a decedent.
QUALIFIED PLANS	Various types of pension and retirement plans, usually established by your employer, which accumulate tax-free. These benefits are usually included in your taxable estate, and the beneficiary designation should be reviewed for the best estate tax result, as well as income tax treatment for the beneficiary named in the event of death.
REVOCABLE LIVING TRUST	<p>A Revocable Living Trust is an effective way to provide lifetime and after-death property management and estate planning. When you set up a Living Trust, you are the Grantor. Anyone you name within the Trust who will benefit from the assets in the Trust is a beneficiary. In addition to being the Grantor, you also serve as your own Trustee (Original Trustee). As the Original Trustee, you can transfer legal ownership of your property to the Trust. This can save your estate from estate taxes when you die. A Revocable Living Trust does not constitute a gift, so there are no gift tax consequences in setting it up.</p> <p>Tax-favored assets, where recognition of income has been deferred (IRAs, Roth IRAs, qualified plans under IRC §401(a), tax sheltered annuities, and qualified deferred compensation, for example) are not included or deemed to be transferred to the trust. In those instances, the beneficiary designations on the accounts would need to be changed by you.</p> <p>A primary reason is for setting up Revocable Living Trusts is to avoid probate, but there are many other reasons. Please discuss the pros and cons in detail with Paige.</p>
RIGHT OF SURVIVORSHIP	<p>The power of the successor or successors of a deceased individual to acquire the property of that individual upon his or her death.</p> <p>The right of survivorship determines what happens to a certain type of co-owned property after one of its owners dies. Under law there are many kinds of co-ownership, but the right of survivorship is found only in joint tenancy, a contract between two or more parties specifying their simultaneous ownership of some form of real or personal property such as a house, land, or money. In all joint tenancies, at the death of one of the joint tenants, ownership of the remaining property passes to the survivor or survivors or successors, who assert the right of survivorship.</p>
SPECIAL NEEDS TRUST	A Special Needs Trust is a trust designed for beneficiaries who are disabled, either physically or mentally. It is written so the beneficiary can enjoy the use of property that is held in the trust for his or her benefit, while at the same time allowing the beneficiary to receive essential needs-based government benefits. Many clients elect to do a Stand By Special Needs Trust, which would only come into play if a beneficiary is receiving needs-based government financial benefits, in order to ensure an inheritance does not disqualify the beneficiary from receiving those benefits.
SUCCESSOR EXECUTOR	The person named in your Will to serve as Executor if your first choice is unable or unwilling to serve.

TENANCY IN COMMON	Tenancy in common is a form of concurrent estate in which each owner is regarded by the law as owning separate and distinct shares of the same property. By default, all co-owners own equal shares, but their interests may differ in size. This form of ownership is most common where the co-owners are not married or have contributed different amounts to the purchase of the property. The assets of a joint commercial partnership might be held as a tenancy in common. Tenants in common have no right of survivorship, meaning that if one tenant in common dies, that tenant's interest in the property will be part of his or her estate and pass by inheritance to that owner's devisees or heirs, either by will, or by intestate succession.
TESTATOR/TESTATRIX	A person who has made a Will.
TOTAL ASSETS	An asset is an economic resource. Anything tangible or intangible that is capable of being owned or controlled to produce value and that is held to have positive economic value is considered an asset. The sum of current and long-term assets owned by a person, company, or other entity equals Total Assets.
TOTAL LIABILITIES	A liability is an obligation arising from past transactions or events, the settlement of which may result in the transfer or use of assets, provision of services or other distribution of economic benefits in the future.
TOTAL NET ESTATE VALUE	Total assets minus total liabilities of an individual or company determines one's total net estate value.
TRUST	A legal entity whereby a person (the trustee) holds legal title to the trust property and holds it for the benefit of another person (the beneficiary). You may decide how much discretion or control to give the trustee, who the trustee will be, the age for ultimate distribution to the beneficiaries, etc. Trusts are established for disability, tax reduction, gifts for minor children and charitable giving. A trust can be created during your lifetime (inter vivos) or in your Will upon your death (testamentary).
TRUSTEE OR SUCCESSOR TRUSTEE	The individual or bank (or any combination) named in a trust to manage the trust. A successor trustee should be appointed in the event the original trustee is unable or unwilling to serve. Sometimes more than one person is appointed, and they serve jointly as Co-Trustees.
WILL	A document, signed with the formalities required by Georgia law, by which a person makes disposition of his or her property, to take effect after his or her death.

