

PLEASE FILL OUT ALL INFORMATION COMPLETELY, INCLUDING FULL NAMES AND FULL ADDRESSES

Davison Eastman Muñoz Paone, P.A.

ESTATE PLANNING QUESTIONNAIRE

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PLEASE FILL OUT ALL INFORMATION COMPLETELY, INCLUDING FULL NAMES AND FULL ADDRESSES

Name _____

Date _____ File Number _____

Home Phone No. _____ Business Phone No. _____

E-mail address _____ Fax No. _____

This form is extremely important. Your accuracy and completeness in responding will help me best represent you. Please bring this information with you to the appointment. Please note that NJRPC 1.6 requires disclosure by an attorney of any information learned by that attorney to each client who may be planning their estate together.

A. PERSONAL DATA

(Client) Full Name _____ (Partner) Full Name _____

Street Address _____

City _____ State _____ Zip _____

Borough _____ Township _____ City (PLEASE CIRCLE ONE) _____ COUNTY _____

Birth Date _____ Birth Date _____

U.S. Citizen? Yes No U.S. Citizen? Yes No

Annual Income _____ Annual Income _____

B. REFERRAL

By whom were you referred to this office?

Name _____

Street Address _____

City _____ State _____ Zip _____

Have you visited our Website? Yes No

Do you have any ideas for improving our Website? If so, please discuss.

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C. CHILDREN (if applicable)

Child's Name	Address (including zip code)	Home Phone Number	Work Phone Number	Date of Birth

Does the Client have any children by a previous marriage? Yes No

Does the Partner have any children by a previous marriage? Yes No

Are all of your children in good health? Yes No

Are any of your children blind? Yes No

Are any of your children disabled? Yes No

Have all of your children completed their education? Yes No

Are any of your children receiving SSI or other form of government entitlement? Yes No

Do any of your family members have any problems with:

Aids? Yes No

Drug Addiction? Yes No

Alcoholism? Yes No

Spendthrift? Yes No

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D. GRANDCHILDREN

Grandchild's Name	Address (including zip code)	Date of Birth

E. DISPOSITIVE INTENTIONS

1. PARTNER AND CHILDREN

Do you wish to provide primarily for your partner and secondarily for your children?

_____ Yes _____ No

Do you wish to treat all of your children equally?

_____ Yes _____ No

If not, why not? _____

After your partner's death, at what age do you want distribution to your children? _____
(e.g., a typical plan provides for 1/3 at age 25, 1/2 at age 30 and the balance at age 35 or immediate)

2. GRANDCHILDREN

Do you want to leave a specific amount of money or a percentage of your estate to your grandchildren?

_____ Yes _____ No

Do you wish to treat all of your grandchildren equally?

_____ Yes _____ No

If not, why not? _____

How much do you want to leave to your grandchildren? _____

At what age do you want distribution to your grandchildren children? _____
(e.g., a typical plan provides for 1/3 at age 25, 1/2 at age 30 and the balance at age 35 or immediate)

3. CHARITIES

Do you want to leave a specific amount of money or other assets to any charity?

_____ Yes _____ No

If yes, please list:

Name of Charity	Address of Charity	Dollar Amount

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Name of Charity	Address of Charity	Dollar Amount

4. **OTHER BENEFICIARIES**

Do you want your Will to benefit anyone other than children, grandchildren or a charity?
 ___ Yes ___ No

If so, please list:

Name of Beneficiary	Address of Beneficiary	Relationship	Dollar Amount

F. **EXECUTOR**

Whom do you want to serve as your Executor?

(Client)

First Choice: ___ Partner ___ Other _____

Second Choice _____

(Name and Full Address)

Third Choice _____

(Name and Full Address)

(Partner)

First Choice: ___ Partner ___ Other _____

Second Choice _____

(Name and Full Address)

Third Choice _____

(Name and Full Address)

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G. TRUSTEE

Whom do you want to serve as your Trustee?

(Client)

First Choice _____

(Name and Full Address)

Second Choice _____

(Name and Full Address)

(Partner)

First Choice _____

(Name and Full Address)

Second Choice _____

(Name and Full Address)

H. GUARDIAN

If you have **minor** or **disabled** child/children, whom do you want to act as Guardian?

First Choice _____

(Name and Full Address)

Second Choice _____

(Name and Full Address)

I. LIVING WILL

(Client)

Do you want your Living Will to provide for withdrawal of extraordinary and heroic efforts to maintain you and to withdraw artificial food and fluid if you have no chance of recovery? Yes No

Do you want to donate your eyes or organs? Yes No

Do you want your Health Care Agent to consult with any other person prior to acting? Yes No

If yes, with whom? _____

Do you have any specific burial instructions? _____

Name of Proposed Health Care Agent _____

Street Address _____

City _____ State _____ Zip _____

Name of Proposed Alternate Health Care Agent _____

Street Address _____

City _____ State _____ Zip _____

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(Partner)

Do you want your Living Will to provide for withdrawal of extraordinary and heroic efforts to maintain you and to withdraw artificial food and fluid if you have no chance of recovery? Yes No

Do you want to donate your eyes or organs? Yes No

Do you want your Health Care Agent to consult with any other person prior to acting? Yes No

If yes, with whom? _____

Name of Proposed Health Care Agent _____

Street Address _____

City _____ State _____ Zip _____

Name of Proposed Alternate Health Care Agent _____

Street Address _____

City _____ State _____ Zip _____

What are the name and address of each of your primary care physician?

Full Name of Physician _____

Street Address _____

City _____ State _____ Zip _____

J. POWER OF ATTORNEY

(Client)

Name of Proposed Financial Agent _____

Street Address _____

City _____ State _____ Zip _____

Effective Only on Disability Yes _____ No _____

Name of Proposed Alternate Financial Agent _____

Street Address _____

City _____ State _____ Zip _____

(Partner)

Name of Proposed Financial Agent _____

Street Address _____

City _____ State _____ Zip _____

Effective Only on Disability Yes _____ No _____

Name of Proposed Alternate Financial Agent _____

Street Address _____

City _____ State _____ Zip _____

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K. MISCELLANEOUS

Do you have any other legal issues which I should be aware of? Yes No

If yes, please explain _____

What is the location of your important papers? _____

Have you ever made gifts to any one person in excess of \$10,000 in any one calendar year?
 Yes No

Have you ever filed a Federal Gift Tax Return? Yes No

L. Real Property.

Personal Residence:

Tax Block # _____, Lot # _____ (Can be obtained from Tax Bill)

Addresses of real property other than personal residence:

(1) City _____ State _____ Zip _____

Tax Block # _____, Lot # _____ (Can be obtained from Tax Bill)

(2) City _____ State _____ Zip _____

Tax Block # _____, Lot # _____ (Can be obtained from Tax Bill)

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M. FINANCIAL SUMMARY

ASSETS

	Client	Partner	Joint
Bank Accounts	\$ _____	\$ _____	\$ _____
Real Estate (residence)	\$ _____	\$ _____	\$ _____
Real Estate (other)	\$ _____	\$ _____	\$ _____
Savings Certificates (CDS)	\$ _____	\$ _____	\$ _____
Stocks - Non Mutual Funds	\$ _____	\$ _____	\$ _____
Stocks - Non Mutual Funds	\$ _____	\$ _____	\$ _____
Bonds - Non Mutual Funds	\$ _____	\$ _____	\$ _____
Bonds - Non Mutual Funds	\$ _____	\$ _____	\$ _____
Mutual Funds	\$ _____	\$ _____	\$ _____
Note and Mortgages Receivables	\$ _____	\$ _____	\$ _____
Business Interests	\$ _____	\$ _____	\$ _____
Inheritance, etc.	\$ _____	\$ _____	\$ _____
Automobiles	\$ _____	\$ _____	\$ _____
Jewelry & Collections	\$ _____	\$ _____	\$ _____
Non-IRA Tax Qualified Retirement Plans	\$ _____	\$ _____	\$ _____
IRAs	\$ _____	\$ _____	\$ _____
Life Insurance	\$ _____	\$ _____	\$ _____
Annuities	\$ _____	\$ _____	\$ _____
Other Assets	\$ _____	\$ _____	\$ _____
TOTALS	\$ _____	\$ _____	\$ _____

Trusts _____

Business Interests _____

Mortgages and other loans and amounts _____

Insurance _____

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N. Additional Information you may think we should know _____

O. CERTIFICATION

The undersigned hereby represents to DAVISON EASTMAN MUÑOZ PAONE, P.A. and each of its attorneys that the information contained in this intake form is accurate and complete, and that the undersigned understands that the law firm and its individual lawyers will rely on this information. I understand that if the information contained herein is inaccurate or incomplete, the recommendations made by the law firm may not be appropriate.

Signature of Client(s):
