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Preliminary Estate Planning Questionnaire

1. NAMES

Name	Date of Birth	Citizenship
(H)		
(W)		

2. RESIDENCE

Home address: _____ Business address: _____

Phone: _____ Phone: _____
County: _____

Any other states which might be considered a residence, such as vacation home or voting address: _____

3. **CHILDREN**

Name	Date of Birth	Married	No. of Children

4. **CURRENT INFORMATION** (Bring copies of relevant agreements, decrees or settlement papers, gift tax returns, etc.)

Prenuptial agreement? _____

Previous marriages? _____

Prospective inheritances or interests in trust, etc.? _____

Prior gifts made? _____

Custodial or trust accounts for children/grandchildren? _____

5. **APPOINTMENT OF FIDUCIARIES**

Guardians for minor children:

The guardian is the individual(s) who will take custody of your minor children when there is no surviving parent. The guardian's role is parental in nature rather than financial. You should name a successor guardian in the event the first named guardian is unable or unwilling to serve.

Guardian _____

First Alternate _____

Second Alternate _____

Personal representatives to administer estate during probate:

The Personal Representative (PR) or Executor is the individual or entity (such as a bank or trust company) designated to identify and collect assets of your estate to pay claims, expenses, and obligations of the estate, settle any tax liability, and distribute the estate as provided in your Will. Spouses generally serve for each other, and another individual or trust company should be named as the successor.

PR _____

First Alternate PR _____

Second Alternate PR _____

Trustees to manage funds held in trust for spouse, children, or others:

The Trustee is the individual or entity (such as a bank or trust company) designated to hold, manage and distribute assets placed in any trust(s) established as part of your estate plan. The Trustee is guided by state law, and may obtain and rely on the advice of professionals regarding assets management.

Trustee _____

First Successor Trustee _____

Second Successor Trustee _____

6. GENERAL DISTRIBUTION

Most clients prefer to have all assets held for the surviving spouse on the death of the first spouse, whether in trust or distributed outright. On the death of the second spouse, typically assets are to distribute to or held for children.

Do you prefer to hold all assets for the surviving spouse?

When should assets be distributed to children:

Immediately (not recommended if children are under 18)

Specific ages, such as 25,30 and 35

Specific purposes, such as the purchase of a home, creation of a business, or others

7. SPECIFIC DISTRIBUTIONS

Assuming the general distribution structure set forth above, are there any specific distributions or amounts to be set aside for others, such as other family members or charities, and at what point in time should these distributions be made: on the death of the first spouse or the second spouse?

8. POWERS OF ATTORNEY

We recommend that clients consider signing a power of attorney that would provide for the appointment of a designated agent (or attorney-in-fact) to act on your behalf if you are disabled.

Attorney-in-fact (typically, spouse) _____

Alternate _____

Second alternate _____

We recommend that clients also consider a power of attorney for health care decisions. The person appointed as holding power of attorney for health care is granted the authority for making health care decisions, including end of life decisions, in the event you are incapacitated, including formally consenting to treatment and accessing medical records.

Attorney-in-fact (typically, spouse) _____

Alternate _____

Second alternate _____