

Law Office of Sarah L. Atwood, PLLC
119 NE 56th Street
Seattle, WA 98105
FAX (206) 523-3702

Prior to our conference, you [and your spouse) should give some thought to the person(s) you will name as the "executor" of your Will. You should also designate an "alternate executor" should your first choice be unable or unwilling to serve. The executor is the person who will be in charge of administering your property under the terms of your Will. (Each of you may designate the surviving spouse as executor, but it is customary and desirable to also name a relative, trusted friend, or financial advisor to serve as an alternative executor should the need arise. You should also consider who would act as trustee of any trust you may wish to establish for the surviving spouse. I recommend that you consider appointing the surviving spouse as trustee but you may wish to designate a successor trustee should the surviving spouse be unwilling or unable to act as trustee of his or her trust.)

1. Please name who will act as executor of the estate?

2. Please name who will act as *Alternate* executor of the estate should your first choice at a later date be unwilling or unable to act? Please provide their address.

Your Will should also designate an individual and an alternate to serve as guardian of the person of any minor children should neither of you be able to act.

3. Who will act as guardian of any minor children? Please provide their address.

4. Who will act as *alternate* guardian of any minor children? Please provide their address.

In the event that you both die leaving minor children, you will probably want to transfer your property to a trust for their benefit. If a trust is not created, it will be necessary to appoint a guardian of the estate of the child to manage the property of each minor, a process that is cumbersome and expensive. Accordingly, I recommend that you include in your Will a trust for the benefit of your children. If you do include a trust, the Will should name one or more trustees to manage the trust property and be responsible for carrying out the terms of the trust. The same person may serve as guardian of your minor children and as trustee of the child's trust, except that a corporate trustee cannot act as guardian of the person of a child. Finally, you should consider how you would like your property to be distributed if your children and grandchildren fail to survive you.

To summarize, although we will be discussing these matters in detail in our conference, it would be helpful to consider the following prior to our conference:

5. Who will act as trustee of any trust for spouse? Please provide their address.

6. Who should be trustee of any trust for descendants? Should it be the same as the guardian?

7. What should be the age(s) for distribution from the trust to the children?

8. Please list any items of property you wish to give to a particular person. This might include items of significance to one family, such as photos or family mementos. Please provide a separate list for each person. (We recommend you take digital photos of each of these items to help your Executor locate them.) (Attach separate sheets if necessary)

9. Are special provisions necessary for a family business?

10. How should your estate pass if your spouse or any descendants do not survive you?

11. Are there any pets? What provisions would you like to make for them? Do you have a designated caregiver and alternate?

12. Please list any large or valuable items of property that are in your possession but which you do not own. Please also list the owner of this property.

Estate Planning Questionnaire

Instructions:

The purpose of this questionnaire is to help you organize the information I will need to develop your estate plan. Please read all the questions through before you begin answering. If you currently have a Will, please bring it to the initial meeting or send it to me with this questionnaire. Answer as many questions as you can, ignoring the notes in square [] brackets.

1. Name _____ (please do not use initials, provide full legal names)
Spouse _____

2. Address _____
County: _____
Home Telephone: _____
Work Telephone: _____

3. Social Security Numbers:
Husband: _____
Wife: _____
Taxpayer ID Number (if any): _____

4. Date and place of marriage: _____
Date and place of prior marriage(s): _____
Date and place of prior divorce(s): _____

5. Date and place of birth [U.S. citizen; inherit property abroad]
Husband: _____
Wife: _____

6. Length of residence in Washington: _____

7. Full names and birth dates of natural children who live with you:
Name: _____ Birth date: _____
Name: _____ Birth date: _____
Name: _____ Birth date: _____
Name: _____ Birth date: _____
Name: _____ Birth date: _____
Name: _____ Birth date: _____
Do you have more than six (6) natural children living with you? _____

8. Full names, birth dates and addresses of natural children who are emancipated:
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____

Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Do you have more than six (6) natural children who are emancipated? _____

9. Full names, birth dates and addresses of any children by prior marriages (please include addresses):

Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Do you have more than six (6) children by prior marriages? _____

10. Full names and birth dates of any adopted children (please include addresses):

Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Do you have more than four (4) adopted children? _____

11. Do you have any foster children? _____

12. Do you have any deceased children who have surviving children? If so, provide full names, date of birth, and addresses:

Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Name: _____ Birth date: _____ Address: _____
Do you have more than six (6) children meeting these criteria? _____

13. Real estate -- list location, current value and amount owing on any mortgages:

Location: _____ Current Value: \$ _____ Amount Owed: \$ _____
Location: _____ Current Value: \$ _____ Amount Owed: \$ _____
Location: _____ Current Value: \$ _____ Amount Owed: \$ _____
Location: _____ Current Value: \$ _____ Amount Owed: \$ _____
Location: _____ Current Value: \$ _____ Amount Owed: \$ _____
Location: _____ Current Value: \$ _____ Amount Owed: \$ _____
Location: _____ Current Value: \$ _____ Amount Owed: \$ _____
Location: _____ Current Value: \$ _____ Amount Owed: \$ _____
Do you have more than nine (9) properties? _____

14. Bank accounts -- list current balance, bank and branch, type of account (savings, checking, etc.), and type of ownership: [Joint Tenant Right of Survivorship (JTWROS) OR Joint Tenant without Right of Survivorship (JTWOROS)]

Bank and Branch: _____ Type: _____ Ownership: _____ Balance: \$ _____
 Bank and Branch: _____ Type: _____ Ownership: _____ Balance: \$ _____
 Bank and Branch: _____ Type: _____ Ownership: _____ Balance: \$ _____
 Bank and Branch: _____ Type: _____ Ownership: _____ Balance: \$ _____
 Bank and Branch: _____ Type: _____ Ownership: _____ Balance: \$ _____
 Bank and Branch: _____ Type: _____ Ownership: _____ Balance: \$ _____

Do you have more than six (6) bank accounts? _____

15. Stocks, mutual funds and bonds -- list company, number of shares, current value, and ownership:
 [survivorship and how owned]

Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____
 Company: _____ Number of Shares: _____ Current Value: \$ _____ Ownership: _____

Do you have more than twelve (12) stocks, mutual funds and bonds? _____

16. Business investments -- list current value [check buy/sell agreements]

Description: _____ Current Value: \$ _____
 Description: _____ Current Value: \$ _____
 Description: _____ Current Value: \$ _____
 Description: _____ Current Value: \$ _____
 Description: _____ Current Value: \$ _____
 Description: _____ Current Value: \$ _____
 Description: _____ Current Value: \$ _____

Do you have more than seven (7) stocks, mutual funds and bonds? _____

17. Life insurance -- list company, policy number, type, beneficiary, face amount, and cash value:

Company: _____ Policy number: _____ Beneficiary: _____
 Face Amount: \$ _____ Cash Value: \$ _____
 Company: _____ Policy number: _____ Beneficiary: _____
 Face Amount: \$ _____ Cash Value: \$ _____
 Company: _____ Policy number: _____ Beneficiary: _____
 Face Amount: \$ _____ Cash Value: \$ _____
 Company: _____ Policy number: _____ Beneficiary: _____
 Face Amount: \$ _____ Cash Value: \$ _____

Do you have more than four (4) life insurance policies? _____

18. IRA and/or employee benefits -- this includes life insurance, disability insurance, pensions and profit sharing plans, and 401(k) plans, please provide current value:

19. Military benefits: _____

20. List any unusual items of personal property -- guns, coins, china, art objects, furniture valued at \$3,000 or more. Do you need more space for the list? _____ Please use a separate sheet.

21. List your debts:

Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____

Do you have more debts to list?

22. TOTAL VALUE OF COMMUNITY PROPERTY ESTATE (add lines 13 through 20, subtract line 21):
\$ _____

23. List current value of any property owned by either of you prior to your marriage:

Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____

Do you have more property to list?

24. List current value of any property you own located outside Washington State:

Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____
Description: _____	Amount:\$ _____

Do you have more property to list?

25. List current value of property you acquired while married, but prior to moving to Washington [Quasi Community Property]:

Description: _____ Amount:\$ _____
Description: _____ Amount:\$ _____
Description: _____ Amount:\$ _____
Description: _____ Amount:\$ _____

Do you have more property to list?

26. List any inheritance or gifts received by either of you to date:

Description: _____ Amount:\$ _____
Description: _____ Amount:\$ _____
Description: _____ Amount:\$ _____
Description: _____ Amount:\$ _____

Do you have more inheritance or gifts to list?

27. Are either of you expecting any inheritance or gifts? If so, indicate from whom and the amount, if you know it.

From Whom: _____ Amount:\$ _____
From Whom: _____ Amount:\$ _____
From Whom: _____ Amount:\$ _____
From Whom: _____ Amount:\$ _____
From Whom: _____ Amount:\$ _____

Do you expect more inheritance or gifts than there is space to list?

28. TOTAL VALUE OF SEPARATE PROPERTY (add lines 23 through 27):

Husband: \$ _____
Wife: \$ _____

29. Do you anticipate that you will be moving to another state? _____

30. Do you have a safe-deposit box? _____

If YES, list bank and authorized signatures. [Add an adult child to signatures.]

Bank: _____ Authorized Signatures: _____
Authorized Signatures: _____
Authorized Signatures: _____
Bank: _____ Authorized Signatures: _____
Authorized Signatures: _____
Authorized Signatures: _____

Do you have more than two (2) safe-deposit boxes? _____

31. Does any family member receive income from any trust or expect to be named beneficiary or remainderman of a trust? Please describe and furnish copies. Continue of separate sheet if you need more space. [Power of appointment, disclaimer]

32. Are you a trustee, guardian or executor? _____

33. Have you ever executed a community property agreement? Yes: _____ No: _____ If so, please attach.
[Prepare termination?]

34. Have you ever signed any prenuptial or post-nuptial agreements other than a community property agreement? Yes: _____ No: _____ If so, please attach.

35. Have you ever created a trust except as part of a Will? Yes: _____ No: _____

36. Do you have any obligations to or from a former spouse or to children from a prior marriage? Yes: _____
No: _____ If so, please attach.

37. Have you made any recent gifts? Yes: _____ No: _____

After you have completed this form please either mail, email or FAX it to my office at the address on page one.
If you have questions about the form, please note them separately and bring them to the initial meeting.

Sincerely,



Sarah L. Atwood
Attorney at Law