

KRAMER LAW GROUP
ESTATE PLANNING QUESTIONNAIRE
MARRIED CLIENTS

Whom may we thank for referring you to our office? _____

Date Questionnaire Completed: _____

I. NAMES

A. Husband's full name _____

B. Wife's full name _____

C. Signature names (names you use to sign legal documents) _____

II. ADDRESSES

A. Residence * _____

B. Vacation Property * _____

* **Please bring the most recent copies of your real property deed(s) to our initial meeting.**

III. TELEPHONE NUMBERS, FACSIMILE NUMBERS AND E-MAILS

A. Residence: Phone: _____

Fax: _____ Call before faxing? _____

E-Mail: _____

B. Husband's business: Phone: _____

Fax: _____ Call before faxing? _____

E-Mail: _____

C. Wife's business: Phone: _____
Fax: _____ Call before faxing? _____
E-Mail: _____

IV. DATES AND PLACES OF BIRTH

A. Date of husband's birth _____
B. Place of husband's birth _____
C. Date of wife's birth _____
D. Place of wife's birth _____

V. CITIZENSHIP

A. Is husband a U.S. citizen? ___ Yes ___ No
B. Is wife a U.S. citizen? ___ Yes ___ No

VI. MARITAL HISTORY

A. Date of marriage _____
B. Place of marriage _____
C. Date husband and wife came to California if married elsewhere _____
D. Husband's prior marriages
1. Name of former wife(s) _____
2. Date or year of termination of marriage(s) _____
3. Continuing legal obligations (such as alimony or child support) _____

E. Wife's prior marriages

1. Name of former husband(s) _____
2. Date or year of termination of marriage(s) _____
3. Continuing legal obligations (such as alimony or child support) _____

VII. CHILDREN OF THIS MARRIAGE (indicate if any are adopted)

<u>Name</u>	<u>Birthdate</u>
_____	_____
_____	_____
_____	_____
_____	_____

VIII. CHILDREN OF PRIOR MARRIAGES (indicate parent by H or W)

<u>Name</u>	<u>Parent</u>	<u>Birthdate</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Has any child named above been adopted by another?

___ No ___ Yes. If yes, indicate child and give name of adopting parent: _____

IX. DECEASED CHILDREN

Name

Surviving descendants
of deceased child

X. GRANDCHILDREN

Name

Parent

Birthdate

XI. NAMES OF PARENTS (indicate whether living or deceased)

A. Husband's father _____

B. Husband's mother _____

C. Wife's father _____

D. Wife's mother _____

XII. OCCUPATION

A. Husband

1. Employer _____
2. Address _____
3. Position or occupation _____

B. Wife

1. Employer _____
2. Address _____
3. Position or occupation _____

XIII. SOCIAL SECURITY NUMBERS

Husband _____ Wife _____

XIV. INCOME

- A. Husband's annual earned income _____
- B. Wife's annual earned income _____
- C. Other annual community property income _____
- D. Husband's annual separate property income _____
- E. Wife's annual separate property income _____

XV. <u>ASSETS</u>	<u>Form of Title*</u>	<u>Estimated Current Value</u>
A. Real property	_____	_____
B. Cash & Cash Equivalents	_____	_____
C. Securities	_____	_____
D. Business Interests	_____	_____
E. Debts owed to you	_____	_____
F. Death & Retirement Benefits	_____	_____
G. Annuities	_____	_____
H. Life Insurance (List Face Value)	_____	_____
I. Furniture, Jewelry, Art, Cars, Etc.	_____	_____
J. Other Assets (Describe)		
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
K. What was your approximate net worth at the date you were married (i.e., your net worth <u>before</u> marrying)?		
Husband: _____	Wife: _____	

* If property is owned as separate property, please indicate the owner spouse. For example, if the wife owns property as her separate property, please indicate "W:SP."

XVI. MAJOR LIABILITIES

Estimated
Amount Owed

A. Mortgages

1. _____

2. _____

B. Commercial Loan

1. _____

2. _____

3. _____

C. Debt owed to private parties

1. _____

2. _____

D. Other (please describe)

1. _____

2. _____

3. _____

XVII. GUARANTEES (please describe)

Primary
Obligor

Amount
Guaranteed

A. _____

B. _____

C. _____

XVIII. MISCELLANEOUS QUESTIONS (Please answer each of the following questions. If the answer to any question is yes, please provide a brief explanation below.)

- A. Are there any agreements between you affecting the nature of your property?
(E.g., a pre-marital agreement, also known as a pre-nuptial agreement, or property or real estate ownership agreements, etc.)
 No Yes
- B. Have you made any gifts over \$3,000 before 1982 or over \$10,000 after 1981?
 No Yes
- C. Have you created or made gifts to any trust? No Yes
- D. Have you received any significant gifts or inheritances? No Yes
- E. Do you expect to receive any significant gifts or inheritances? No Yes
- F. Are you the beneficiary of any trust? No Yes
- G. Is there any person you would like to receive a bequest who is not a spouse, child or grandchild? No Yes
- H. Do any of your beneficiaries have any special needs? No Yes

Explanation: _____

XIX. PREFERRED FIDUCIARIES

	<u>First Choice(s)</u>	<u>First Alternative(s)</u>	<u>Second Alternative(s)</u>
Executor	1. _____	2. _____	3. _____
Trustee (if any)	1. _____	2. _____	3. _____
Guardian of minors (if any)	1. _____	2. _____	3. _____

XX. CURRENT ADVISORS

A. Accountant

Name _____

Company _____

Address _____

Telephone _____

B. Life Insurance Agent

Name _____

Company _____

Address _____

Telephone _____

C. Securities Broker

Name _____

Company _____

Address _____

Telephone _____

D. Investment Advisor

Name _____

Company _____

Address _____

Telephone _____

E. Others
