

NAME: _____

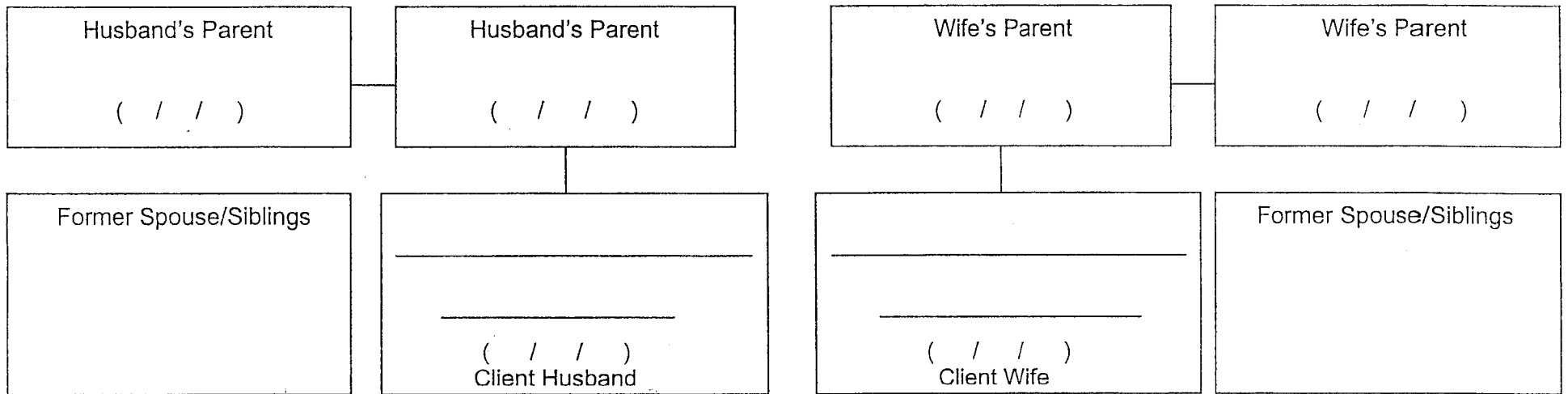
DATE: _____

ESTATE QUESTIONNAIRE

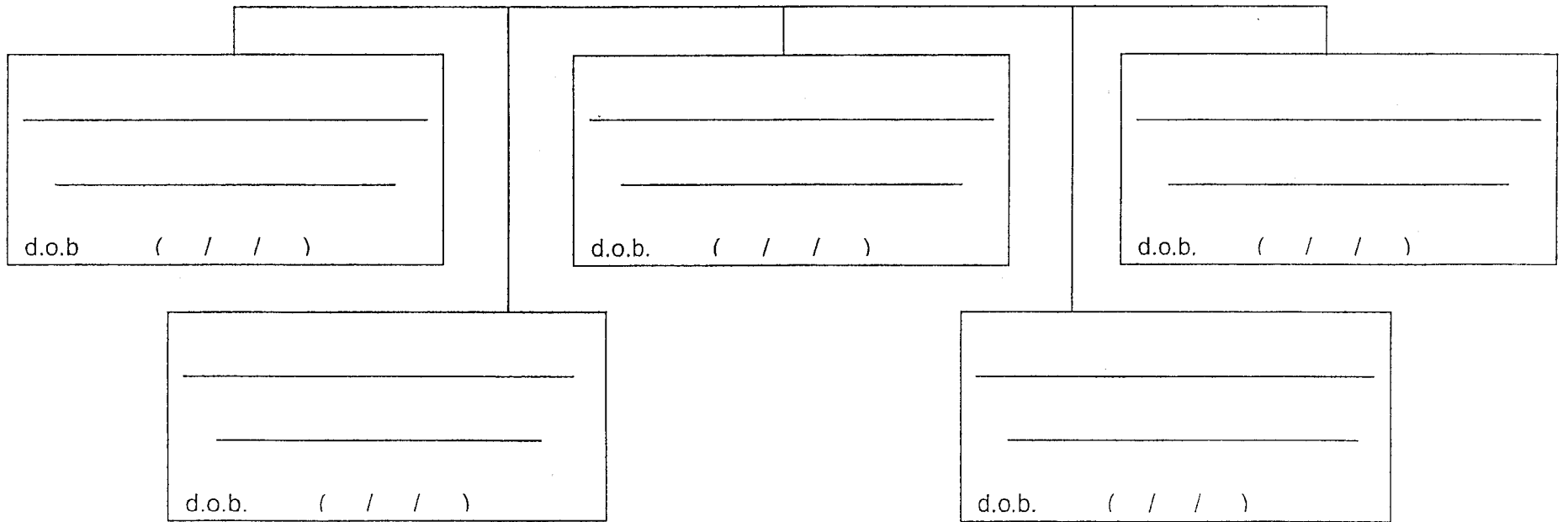
	<u>YES</u>	<u>NO</u>
1. Do you have an old Will or Trust?	_____	_____
2. Do you have any Powers of Attorney? (Health Care or Financial)	_____	_____
3. Are there any prior marriages?	_____	_____
4. Are there any children from a previous relationship or marriage?	_____	_____
5. Are there any deceased children with heirs?	_____	_____
6. Are there any children with any disability?	_____	_____
7. Are any children financially unstable?	_____	_____
8. Can both spouses handle their own affairs?	_____	_____
9. Does either spouse suffer from any debilitating illness such as Diabetes, cancer, Alzheimer's, etc?	_____	_____
10. Do you have any trips or vacations planned in the near future?	_____	_____

THE

FAMILY TREE



CHILDREN



ASSETS

	<u>DESCRIPTION</u>	<u>LOCATION</u>	<u>VALUE</u>
I.	Real Property		
A.	Homestead _____		
	Liens: _____		
B.	Other Real Property _____		
	Liens: _____		
II.	Personal Property		
A.	Retirement Vehicles		
1.	401(k) _____		

2.	IRA _____		

3.	Profit Sharing _____		
4.	Pension – Miscellaneous _____		

B.	Deposits w/Financial Institutions		
1.	Checking Accts. _____		
2.	Savings Accts. _____		
3.	Certificates of Deposit _____		

C.	Investments		
1.	Mutual Funds _____		
2.	Stocks _____		
3.	Bonds _____		
4.	Annuities _____		

D. Life Insurance

1. (Husband) _____

1. (Wife) _____

E. Business Ownership Interests _____

F. Miscellaneous

1. Antiques/Collections _____

2. Motor Vehicles _____

3. Jewelry _____

4. Inheritances (by Trust or Will) _____

5. Any Powers of Appointment _____

6. Intangibles – Patent or Copyrights – Royalties _____

ANALYSIS FOR ESTATE TAX

Total Assets: \$ _____

Less Exemption Amount \$ _____

Assets Subject to Taxation \$ _____

approximate Est. Tax Rate

Est. Tax Amount

Trust Savings

WILL VARIABLES

PERSONAL REPRESENTATIVE: (1ST) _____

Address: _____

Relationship: _____

ALTERNATE PERSONAL REPRESENTATIVE: _____

Address: _____

Relationship: _____

GUARDIAN: (1ST) _____

Address: _____

Relationship: _____

ALTERNATE GUARDIAN: _____

Address: _____

Relationship: _____

CONSERVATOR: (1ST) _____

Address: _____

Relationship: _____

ALTERNATE CONSERVATOR: _____

Address: _____

Relationship: _____

TRUSTEE FOR CHILDREN'S TRUST: _____

Relationship: _____

AGES FOR TRUST TO BE DISTRIBUTED: _____

ADDITIONAL BENEFICIARIES: (Cancer Society, Church, School, etc.)

POWERS OF ATTORNEY

DURABLE POWER OF ATTORNEY: (Name and Address of Person to be appointed)

ALTERNATE DURABLE POWER OF ATTORNEY: (Name and Address)

HEALTH CARE POWER OF ATTORNEY: Name & Address of Person to be appointed)

ALTERNATE HEALTH CARE POWER OF ATTORNEY: (Name and Address)

TRUST VARIABLES

1. Grantor
2. Initial Trustee
3. Beneficiaries
4. Children Vesting
5. Special provisions

Trust Variables

1. Name of Trust:

2. Grantor(s): _____

3. Name(s) of Initial Trustee(s) and Relationship to Grantor _____

4. Name of First Successor Trustee: _____

5. Name of Second Successor Trustee: _____

6. (a) Name of Beneficiaries: _____

(b) Terms of Bequests: _____

7. Alternate Beneficiaries should someone predecease Grantor(s) _____

8. Ultimate Taker: _____

9. Minimum Value to Keep Trust Open: _____

DISTRIBUTION OF ASSETS

A. WILL

B. TRUST

DOCUMENTS TO PREPARE:

WILL A _____
(Standard)

WILL C _____
(with Testamentary Trust)

TRUST _____
(Standard)

TRUST _____
(Tax Savings)

CODICIL _____

_____ Authorization to Retain Original Document

_____ General Durable Power of Attorney

_____ Health Care Power of Attorney

_____ Acceptance of Trust

_____ Bill: _____ Will Charge _____

_____ Power of Attorney _____

TOTAL CHARGES _____

AMOUNT PAID _____

INSTRUCTIONS FOR WRITTEN STATEMENT
TRANSFERRING PERSONAL PROPERTY

Under Michigan Law, you may refer to a written statement or list disposing of items of tangible personal property outside your Will upon your death according to the following rules and limitations:

1. It must be personal property—not real property—not otherwise specifically disposed of by the Will.
2. It may not include money, evidence of debts (e.g. promissory note), documents of title (e.g. title to an automobile), securities, or property used in a trade or business.
3. You must write the statement or list in your own handwriting, or you must sign it. It is best to sign the list and date it regardless of whether it is in your handwriting or it is typewritten.
4. You must describe each item with reasonable certainty, (e.g. include serial numbers, model numbers, and any particular or unique characteristics), and you must clearly identify the person or persons to whom you intend to give it (e.g. the name, address, relationship to you).
5. You may prepare this list before or after you prepare and execute your will.
6. You may alter the statement or list after you make it, providing you destroy it so there will not be confusion with the new list.
7. The statement or list need not have legal significance apart from the fact that it transfers property upon your death. In other words, it can simply be a list of property and a statement of your intentions and it does not serve any other purpose.
8. If you authorize this law office to retain the original Will, you should also have this office retain custody of the original list or statement.