

Please send completed questionnaire to
Plunk Smith, PLLC
 2801 Network Boulevard, Suite 300
 Frisco, Texas 75034
 Fax: 972.294.5274

ESTATE PLANNING QUESTIONNAIRE

Please complete this form and return to the address listed above. For optimum accuracy, please type or print clearly. If necessary, please use additional sheets of paper to answer the questions. **PLEASE PROVIDE A COPY OF ANY PREVIOUS WILLS, TRUSTS, AND PREMARITAL AGREEMENTS (IF ANY) ESTABLISHED BY YOU OR FOR YOUR BENEFIT. FINALLY, PLEASE PROVIDE US WITH A COPY OF YOUR CURRENT DRIVER'S LICENSE.**

GENERAL CLIENT INFORMATION				
NAME (LAST)	FIRST	MIDDLE	SOCIAL SECURITY NO.	BIRTH DATE
ARE YOU A CITIZEN OF THE UNITED STATES? <input type="checkbox"/> YES <input type="checkbox"/> NO IF NO, WHAT IS YOUR COUNTRY OF CITIZENSHIP?				
CLIENT'S ADDRESS (INCLUDING CITY, STATE AND ZIP CODE)			COUNTY OF RESIDENCE	
PHONE NUMBER		PREFERRED EMAIL ADDRESS		
NAME, ADDRESS AND PHONE NUMBER OF YOUR CPA (if any)				
NAME, ADDRESS AND PHONE NUMBER OF YOUR FINANCIAL ADVISOR (if any)				
WHO REFERRED YOU TO OUR OFFICE?		DO YOU WISH ANY OTHER PARTY TO RECEIVE COPIES OF YOUR DOCUMENTS? <input type="checkbox"/> YES <input type="checkbox"/> NO IF YES, WHO?		
I. PERSONAL AND FAMILY DATA				
A	ANY PREVIOUS MARRIAGE(S)? <input type="checkbox"/> YES <input type="checkbox"/> NO IF YES, PLEASE STATE THE NAME(S) OF THE FORMER SPOUSE(S), AND THE YEAR THAT THE DEATH OCCURRED, OR DISSOLUTION OF MARRIAGE WAS FINAL.			
B	ARE THERE ANY CHILDREN (INCLUDING ADOPTED CHILDREN) FROM YOUR CURRENT RELATIONSHIP, A PRIOR MARRIAGE, OR PRIOR RELATIONSHIP? <input type="checkbox"/> YES <input type="checkbox"/> NO IF YES, PLEASE LIST BELOW.			
FULL NAME	BIRTH DATE	MOTHER'S NAME	FATHER'S NAME	
HAVE ANY OF THE ABOVE CHILDREN PREDECEASED THEIR PARENTS? <input type="checkbox"/> YES <input type="checkbox"/> NO (IF YES, PLEASE INDICATE WHICH.)				
DO YOU WISH TO PROVIDE FOR CHILDREN BORN TO OR ADOPTED BY YOU IN THE FUTURE? <input type="checkbox"/> YES <input type="checkbox"/> NO				
DO YOU HAVE ANY CHILDREN OR OTHER BENEFICIARIES WITH SPECIAL NEEDS? <input type="checkbox"/> YES <input type="checkbox"/> NO				

C IN A FEW SENTENCES, PLEASE TELL US ABOUT YOUR ESTATE PLANNING GOALS. EXAMPLES OF SUCH GOALS COULD BE MINIMIZING ESTATE TAXES, PROVIDING FOR YOUR DESCENDANTS, PROTECTING A FAMILY BUSINESS, ETC. ADDITIONALLY, PLEASE LIST WHOM YOU WISH TO PROVIDE FOR IN YOUR WILL.

Blank space for estate planning goals.

II. DISPOSITION OF THE ESTATE

A PLEASE LIST ALL SPECIFIC BEQUESTS, IF ANY, THAT YOU WISHE TO MAKE. A "SPECIFIC BEQUEST" IS THE GIFT OF A CERTAIN ARTICLE (SUCH AS A PIECE OF JEWELRY OR A PAINTING) TO A SPECIFIC INDIVIDUAL OR GROUP OF INDIVIDUALS.

SPECIFIC BEQUESTS:

Blank space for listing specific bequests.

B UPON YOUR DEATH, THE ESTATE WILL BE DISTRIBUTED TO THE BENEFICIARIES. THE ESTATE CAN BE DISTRIBUTED "OUTRIGHT" (DIRECTLY TO THE BENEFICIARIES) OR "IN TRUST" (PLACED INTO A TRUST CREATED FOR THE BENEFIT OF THE BENEFICIARIES BUT NOT NECESSARILY CONTROLLED BY THE BENEFICIARIES). BEQUEATHING ASSETS INTO A TRUST ALLOWS FOR ENHANCED CONTROL AND CREDITOR PROTECTION OVER THE ASSETS. FOR MORE GUIDANCE ON THE PROPER OPTION FOR YOU, PLEASE SPEAK WITH ONE OF OUR ATTORNEYS.

IF YOU WISH TO HAVE YOUR ASSETS DISTRIBUTED IN TRUST TO BENEFICIARIES, YOU HAVE THE OPTION OF NAMING BENEFICIARIES, CO-TRUSTEE, AND SOLE TRUSTEE OF THE TRUSTS AT CERTAIN AGES. YOU MAY ALSO ELECT THAT THE BENEFICIARIES NEVER SERVE AS TRUSTEE. FOR MORE GUIDANCE, PLEASE SPEAK WITH ONE OF OUR ATTORNEYS.

AT WHAT AGE SHOULD BENEFICIARIES BECOME CO-TRUSTEE? _____ SOLE TRUSTEE? _____ 2 YEAR CO-TRUSTEE? _____

C IN THE EVENT THAT YOUR PRIMARY BENEFICIARIES ALL PREDECEASE YOU, THE ESTATE WILL PASS TO CONTINGENT BENEFICIARIES. PLEASE LIST DESIRED CONTINGENT BENEFICIARIES BELOW. THE ESTATE WILL BE DISTRIBUTED EVENLY TO ALL CONTINGENT BENEFICIARIES UNLESS YOU INDICATE OTHERWISE.
 IN THE EVENT THAT ONE OF YOUR CONTINGENT BENEFICIARIES PREDECEASES YOU, THAT SHARE OF THE ESTATE WILL BE DISTRIBUTED EVENLY TO ALL OTHER CONTINGENT BENEFICIARIES UNLESS YOU INDICATE OTHERWISE.

	CONTINGENT BENEFICIARIES	RELATION TO CLIENT
1.		
2.		
3.		
4.		

III. DESIGNATION OF EXECUTORS, REPRESENTATIVES, GUARDIANS, AND TRUSTEES

WHO SHOULD BE NAMED AS EXECUTOR OF YOUR ESTATE?

(THE EXECUTOR IS THE PERSON OR INSTITUTION IN CHARGE OF CARRYING OUT THE TERMS OF YOUR WILL.)

	FULL LEGAL NAME	ADDRESS	PHONE NUMBER	RELATION TO CLIENT
1.				
2.				
3.				
4.				

WHO SHOULD BE NAMED AS YOUR FINANCIAL POWER OF ATTORNEY?

SHOULD THIS FINANCIAL POWER OF ATTORNEY BECOME EFFECTIVE IMMEDIATELY OR UPON INCAPACITY?

	FULL LEGAL NAME	ADDRESS	PHONE NUMBER	RELATION TO CLIENT
1.				
2.				
3.				
4.				

WHO SHOULD BE NAMED AS YOUR MEDICAL POWER OF ATTORNEY?

	FULL LEGAL NAME	ADDRESS	PHONE NUMBER	RELATION TO CLIENT
1.				
2.				
3.				
4.				

WHO SHOULD BE NAMED AS TRUSTEE FOR TRUSTS CREATED UNDER YOUR WILL? (NOTE: IT IS ADVISABLE TO NAME A FINANCIAL INSTITUTION AS A BACK-UP TRUSTEE IN CASE ALL INDIVIDUAL TRUSTEES PREDECEASE THE ESTABLISHMENT OF THE TRUST.)

	FULL LEGAL NAME	ADDRESS	PHONE NUMBER	RELATION TO CLIENT
1.				
2.				
3.				
4.				

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IF YOU HAVE MINOR CHILDREN, WHOM WOULD YOU LIKE TO NAME AS THEIR GUARDIANS IN THE EVENT THAT BOTH PARENTS PREDECEASE THE CHILDREN BEFORE THE CHILDREN ARE LEGAL ADULTS?

	FULL LEGAL NAME	ADDRESS	PHONE NUMBER	RELATION TO CLIENT
1.				
2.				
3.				
4.				

IV. APPOINTMENT FOR DISPOSITION OF REMAINS

DO YOU WISH TO BE BURIED CREMATED?

YOUR AGENT TO CONTROL DISPOSITION OF REMAINS WILL HAVE AUTHORITY TO MAKE DECISIONS REGARDING YOUR FUNERAL/MEMORIAL SERVICE, BURIAL AND/OR CREMATION, ETC. PLEASE LIST AT LEAST TWO INDIVIDUALS TO SERVE AS AGENTS, IN THE ORDER OF YOUR PREFERENCE.

	FULL LEGAL NAME	ADDRESS	PHONE NUMBER	RELATION TO CLIENT
1.				
2.				
3.				
4.				

ATTORNEY NOTES

FOR OFFICE USE ONLY

BENEFICIARIES' TRUSTS REVOCABLE TRUST TRANSFER ON DEATH DEED DECLARATION OF GUARDIAN FOR MINORS

REVOCABLE TRUST NAME:

Revised 8.2024