

Estate Planning Questionnaire

*The following are questions to consider in planning for the disposition of your estate.
Fill out this form and submit it to The Business Planning Group for further evaluation.*

To assist you in clarifying your estate planning goals, please indicate your level of concern for each of the items below, using a scale of 1 – 5, as follows:

1- Not a concern 2- A minor concern 3- Moderately important 4- Important 5- Very important

- ___ Naming beneficiaries of my estate, and what might each of them receive
- ___ Choosing who will administer my estate
- ___ Compensation of personal representative
- ___ Legal and financial protection for personal representatives and trustees
- ___ Simultaneous death of me and my spouse, or one death followed by a second shortly thereafter
- ___ Provisions of current life insurance policies
- ___ Distribution of estate assets
- ___ Disposition of personal effects, including specific items in my estate being given to certain individuals
- ___ Family disagreements over estate assets
- ___ Quick transfer of estate assets to beneficiaries
- ___ Disposition of the home and other real property
- ___ Protection of estate assets from family members or others
- ___ Having a plan for any businesses I own
- ___ Burden of estate taxes, debts, expenses, etc. borne by estate or beneficiaries
- ___ Keeping details of estate assets and asset distribution private / not made public

- ___ Leaving gifts to charity
- ___ Ensuring any special wishes are carried out
- ___ Potential need for a guardian for my children
- ___ Providing for my minor children that might survive me
- ___ Remarriage by surviving spouse with marital assets passing to new spouse
- ___ Having someone to make healthcare decisions for me in the event I am unable
- ___ Protection of assets from costs of long term illness
- ___ Making my wishes know about being connected to life support if permanently unconscious or dying

Please use the space below to explain any items you feel might need clarification and to communicate other areas of concern or interest related to your estate goals.

Contact Information

Name & Title: _____

Phone Number: _____

Email: _____