

STRAUSS & TROY

Estate Planning Questionnaire – For Married Persons

DATE: _____

I. PERSONAL INFORMATION

	HUSBAND	WIFE
Name		
Home Address and Telephone Number		
Business Address and Telephone Number		
Date of Birth		
Place of Birth (Citizenship)		
Have you ever lived in any other state or foreign country? If so, where and when?		
Social Security Number		
Do you have a Will?		

II. MARRIAGE INFORMATION

	HUSBAND	WIFE
Date of Marriage		

Do you have financial obligations to a former spouse?		
Do you have an antenuptial agreement?		

III. FAMILY INFORMATION

	HUSBAND	WIFE
Names, addresses and birth dates of children		
Names, addresses and birth dates of grandchildren		
Persons other than children who are dependent upon you for support		

IV. ASSET INFORMATION (all asset information may be estimated)

	HUSBAND	WIFE
Annual Income		

Description of Asset	Value	Form of Ownership and With Whom (Husband, Wife, Joint)
Bank Accounts:		
Certificates of Deposit:		
Other Cash (money market funds, etc.):		

IV. ASSET INFORMATION (Cont'd.)

Description of Asset	Value	Form of Ownership and With Whom (Husband, Wife, Joint)
Automobiles:		
Collections:		
Other Tangible Personal Property:		
Marketable Securities:		

IV. ASSET INFORMATION (Cont'd.)

Description of Asset	Value	Form of Ownership and With Whom (Husband, Wife, Joint)
Closely-held Business Interests and Restricted Securities:		
Real Estate:		
Location: Mortgage Amount \$ _____	Fair Market Value \$ _____	
Location: Mortgage Amount \$ _____	Fair Market Value \$ _____	
Location: Mortgage Amount \$ _____	Fair Market Value \$ _____	
Individual Retirement Accounts:		
Other Retirement Benefits:		

Life Insurance Policies:

1. Company: _____
 Insured: _____
 Owner: _____
 Beneficiary: _____
 Face Value: _____

2. Company: _____
 Insured: _____
 Owner: _____
 Beneficiary: _____
 Face Value: _____

3. Company: _____
 Insured: _____
 Owner: _____
 Beneficiary: _____
 Face Value: _____

V. ASSET SUMMARY

DESCRIPTION	HUSBAND (Value)	WIFE (Value)	JOINT (Value)
Bank Accounts			
Certificates of Deposit			
Other Cash			
Automobiles			
Collections			
Other Tangible Personal Property			
Marketable Securities			
Closely-held Business Interests and Restricted Securities			
Real Estate (Net Value)			
IRA's			
Other Retirement Benefits			
Life Insurance			
TOTAL			

6. If neither your spouse nor your children survive you, who should receive your property?

7. Who would you like to serve as your fiduciaries? A fiduciary may be an individual or a bank.

a. The **Executor** will manage your estate. He or she should be a resident of Ohio; however, out-of-state relatives (by blood or marriage) may serve.

- 1.
- 2.
- 3.

b. The **Trustee** will manage your trust, if you decide to create one. The Trustee must invest and manage money, as well as maintain relationships with the beneficiaries and make decisions about distributions to the beneficiaries.

- 1.
- 2.
- 3.

c. A **Guardian** is responsible for the physical well-being, the estate, or both, of an incompetent or minor. Parents of young children frequently want to name relatives or friends to serve as guardians of their children if both parents die.

- 1.
- 2.
- 3.

8. Is minimizing income and estate taxes a high priority for you?

9. Would you like to make lifetime gifts to your children, other persons, or charity?

10. Would you like a Living Will, a Durable Power of Attorney for Health Care, or a general Durable Power of Attorney? If so, please provide the following information:

- Living Will or Durable Power of Attorney for Health Care:

The name, address, telephone number and relationship (i.e., spouse, daughter, friend) of the person you wish to designate to make health care decisions for you, and the same information regarding any alternate(s) you wish to name if that person is unavailable.

- General Durable Power of Attorney:

The name and address of the person you wish to name as attorney-in-fact.

PLEASE RETURN TO: Thomas C. Rink, Esq.
Strauss & Troy
The Federal Reserve Building
150 East Fourth Street
Cincinnati, OH 45202-4018

If you have any questions, feel free to contact me at 629-9490