



ESTATE PLANNING QUESTIONNAIRE

Thank you for choosing Great Lakes Legal Group. To ensure the attorney is fully prepared to evaluate your unique circumstances, this questionnaire must be completed before your Discovery Call and/or Estate Planning Consultation. The information you provide enables our attorneys to assess your family, assets, and planning objectives so we can recommend an estate plan tailored to your specific needs.

P: 888.478.5253

F: 888.315.5793

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Please answer each question as completely and accurately as possible. If you do not know an answer, write 'Unknown' or 'To Be Provided.'

Section 1 – Personal Information

Full Name

Date of Birth

Last Four Digits of Social Security Number

Email Address

Cell Phone

Home Phone

Residential Address

Marital Status (Single/Married/Separated/Divorced/Widowed)



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If Married: Spouse's Full Name

Spouse's Date of Birth

Date of Marriage

Section 2 – Family Information

Children (Name and Date of Birth for each)

Living Parents

Living Siblings



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Section 3 – Planning & Distribution Objectives

Upon your death, how would you like your assets distributed?

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If you have minor children, how would you like them to receive their inheritance?

Are there specific individuals who should receive certain assets or sentimental items?



Would you like to leave gifts to charities or nonprofit organizations?

Do you expect to receive an inheritance within the next 10 years? If yes, explain.

If your primary beneficiaries predecease you, how would you like your estate distributed?

Section 4 – Asset Information

Checking Accounts (Institution / Account Owner / Beneficiary/ Approximate Balance)



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Savings Accounts (Institution / Account Owner / Beneficiary/ Approximate Balance)

Certificates of Deposit (Institution / Account Owner / Beneficiary/ Approximate Balance)

Money Market Accounts



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Safe Deposit Box

Automobiles (Year / Make / Model / Owned or Leased / Approximate Value)

Jewelry

Valuable Household Furnishings

Art, Collections, Firearms or Other Valuable Personal Property

Other Personal Property

Real Estate (Address / Ownership / Estimated Value / Mortgage Balance)



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Life Insurance (Company / Type / Owner / Beneficiary / Death Benefit)

Investments (Stocks, Brokerage, Bonds, etc.)

(Company / Type / Owner / Beneficiary / Death Benefit)

Retirement & Employer Benefits

(Company / Type / Owner / Beneficiary / Death Benefit)

GREAT LAKES LEGAL GROUP PLLC
ATTORNEYS AND COUNSELORS

Business Interests



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Other Assets

Section 5 – Fiduciary Appointments- INCLUDE NAMES AND DATES OF BIRTH

Financial Power of Attorney (First Choice and Alternate)

Patient Advocate / Healthcare Agent (First Choice and Alternate)

Guardian of Minor Children

Conservator / Trustee for Minor Children's Assets



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Personal Representative / Successor Trustee (First Choice and Alternate)

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Section 6 – Additional Information

Current Estate Planning Documents

Significant Life Changes Since Documents Were Prepared

Additional Family Circumstances, Beneficiary Concerns, or Planning Goals
