

## HAWKINS LAW PC ESTATE PLANNING CLIENT QUESTIONNAIRE

We want to serve you effectively without wasting your time or burdening you with details. Your responses to this questionnaire will help us serve you as quickly and effectively as possible.

### 1. How did you hear about Hawkins Law PC?

- Newspaper     Internet     Family/Friends     Banker     Financial Advisor     Accountant  
 Nursing Home     Other (please tell us) \_\_\_\_\_

### 2. General Information About You:

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Your Mailing Address: \_\_\_\_\_

#### Client 1

Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

Home Telephone: \_\_\_\_\_

Work Telephone: \_\_\_\_\_

Cell Telephone: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Prior Deceased Spouse? Yes  No

Deceased Spouse's Name: \_\_\_\_\_

Date of Death: \_\_\_\_\_

#### Client 2 (Spouse or Significant Other)

Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

Home Telephone: \_\_\_\_\_

Work Telephone: \_\_\_\_\_

Cell Telephone: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Prior Deceased Spouse? Yes  No

Deceased Spouse's Name: \_\_\_\_\_

Date of Death: \_\_\_\_\_

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3. Financial Advisor's Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Firm Name: \_\_\_\_\_ E-mail: \_\_\_\_\_

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4. Tax Advisor's Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Firm Name: \_\_\_\_\_ E-mail: \_\_\_\_\_

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### 5. Client 1's Children (complete all applicable blanks and checkboxes)

Full Name of Child: \_\_\_\_\_ Son  Daughter  Date of Birth: \_\_\_\_\_

Deceased  Date of death if deceased: \_\_\_\_\_ Disabled  If disabled, please describe the type and extent of the disability: \_\_\_\_\_

E-mail Address: \_\_\_\_\_ Best Phone Number: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

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Full Name of Child: \_\_\_\_\_ Son  Daughter  Date of Birth: \_\_\_\_\_  
Deceased  Date of death if deceased: \_\_\_\_\_ Disabled  If disabled, please describe  
the type and extent of the disability: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_ Best Phone Number: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_

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Full Name of Child: \_\_\_\_\_ Son  Daughter  Date of Birth: \_\_\_\_\_  
Deceased  Date of death if deceased: \_\_\_\_\_ Disabled  If disabled, please describe  
the type and extent of the disability: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_ Best Phone Number: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_

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Full Name of Child: \_\_\_\_\_ Son  Daughter  Date of Birth: \_\_\_\_\_  
Deceased  Date of death if deceased: \_\_\_\_\_ Disabled  If disabled, please describe  
the type and extent of the disability: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_ Best Phone Number: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_

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Full Name of Child: \_\_\_\_\_ Son  Daughter  Date of Birth: \_\_\_\_\_  
Deceased  Date of death if deceased: \_\_\_\_\_ Disabled  If disabled, please describe  
the type and extent of the disability: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_ Best Phone Number: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_

***\*Please make sure to list any children who are deceased. \*\*Please add additional pages if necessary***

**6. Client 2's Children (if applicable) – If the clients have the same children, check  and skip to Item 7**

Full Name of Child: \_\_\_\_\_ Son  Daughter  Date of Birth: \_\_\_\_\_  
Deceased  Date of death if deceased: \_\_\_\_\_ Disabled  If disabled, please describe  
the type and extent of the disability: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_ Best Phone Number: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_

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Full Name of Child: \_\_\_\_\_ Son  Daughter  Date of Birth: \_\_\_\_\_  
Deceased  Date of death if deceased: \_\_\_\_\_ Disabled  If disabled, please describe  
the type and extent of the disability: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_ Best Phone Number: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_

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Full Name of Child: \_\_\_\_\_ Son  Daughter  Date of Birth: \_\_\_\_\_  
 Deceased  Date of death if deceased: \_\_\_\_\_ Disabled  If disabled, please describe the type and extent of the disability: \_\_\_\_\_  
 E-mail Address: \_\_\_\_\_ Best Phone Number: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_

Full Name of Child: \_\_\_\_\_ Son  Daughter  Date of Birth: \_\_\_\_\_  
 Deceased  Date of death if deceased: \_\_\_\_\_ Disabled  If disabled, please describe the type and extent of the disability: \_\_\_\_\_  
 E-mail Address: \_\_\_\_\_ Best Phone Number: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_

Full Name of Child: \_\_\_\_\_ Son  Daughter  Date of Birth: \_\_\_\_\_  
 Deceased  Date of death if deceased: \_\_\_\_\_ Disabled  If disabled, please describe the type and extent of the disability: \_\_\_\_\_  
 E-mail Address: \_\_\_\_\_ Best Phone Number: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_

***\*Please make sure to list any children who are deceased. \*\*Please add additional pages if necessary***

**7. Who do you want to receive your assets when you die? It is your choice whether to include or exclude your children, other family members, friends, or nonprofit organizations that you want to help. For beneficiaries other than your spouse or children, please include each person's city and relationship to you. Also, tell us if a person is to receive a specific asset (such as personal belongings, money, or land) when you die. Add pages if needed.**

<b><u>Client 1:</u></b>			
<b>Beneficiary Name</b>	<b>City</b>	<b>Type of Asset</b>	<b>Relationship to You</b>

***\*Add additional pages if necessary***

**Client 2:**

Beneficiary Name	City	Type of Asset	Relationship to You

*\*Add additional pages if necessary*

**8. Who do you want to manage your legal or financial affairs if you become disabled or unable to act?**

<b><u>Client 1:</u></b>		<b><u>Client 2:</u></b>	
First Choice:		First Choice:	
Second Choice:		Second Choice:	
Third Choice:		Third Choice:	
Fourth Choice:		Fourth Choice:	

*\*Add additional pages if necessary*

**9. Please list the person or people who you would want to make health care decisions for you should you become unable to make those decisions. If you want them to serve at the same time instead of in the order of priority shown in the table below, check this box:**

<b><u>Client 1:</u></b>		<b><u>Client 2:</u></b>	
First Choice:		First Choice:	
Second Choice:		Second Choice:	
Third Choice:		Third Choice:	
Fourth Choice:		Fourth Choice:	

*\*Add additional pages if necessary*

**10. Information about your Income and Assets (Please provide all applicable checkboxes and blanks):**

<b>Client 1:</b>	<b>Client 2:</b>
Work Income: \$ _____	Work Income: \$ _____

<p>Social Security: \$ _____</p> <p>Pension: \$ _____</p> <p>Other Income: \$ _____</p> <p>If you have a vested employee pension, please name the employer: _____</p> <p>Currently Employed? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Are you self-employed? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>    Business Name: _____</p> <p>    Business Type: _____</p> <p>Do you own your home? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Mortgage Loan Balance: \$ _____</p> <p>Describe any other real estate that you own, other than your home, including co-ownership with someone else or in a trust:</p>	<p>Social Security: \$ _____</p> <p>Pension: \$ _____</p> <p>Other Income: \$ _____</p> <p>If you have a vested employee pension, please name the employer: _____</p> <p>Currently Employed? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Are you self-employed? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>    Business Name: _____</p> <p>    Business Type: _____</p> <p>Do you own your home? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Mortgage Loan Balance: \$ _____</p> <p>Describe any other real estate that you own, other than your home, including co-ownership with someone else or in a trust:</p>
<p>If you own any coal, oil, gas or other mineral rights or interests, please check the applicable boxes and describe the rights or interests below, including any royalties that you receive:</p>	<p>If you own any coal, oil, gas or other mineral rights or interests, please check the applicable boxes and describe the rights or interests below, including any royalties that you receive:</p>
<p>Coal <input type="checkbox"/> Description:</p>	
<p>Oil <input type="checkbox"/> Description:</p>	<p>Oil <input type="checkbox"/> Description:</p>
<p>Gas <input type="checkbox"/> Description:</p>	<p>Gas <input type="checkbox"/> Description:</p>

Other <input type="checkbox"/>	Description:	Other <input type="checkbox"/>	Description:
Do you expect to receive an inheritance from anyone? Yes <input type="checkbox"/> No <input type="checkbox"/> If so, please explain:		Do you expect to receive an inheritance from anyone? Yes <input type="checkbox"/> No <input type="checkbox"/> If so, please explain:	
Do you have long term care (i.e. nursing home) insurance? Yes <input type="checkbox"/> No <input type="checkbox"/> If so, what is the insurance company's name? _____		Do you have long term care (i.e. nursing home) insurance? Yes <input type="checkbox"/> No <input type="checkbox"/> If so, what is the insurance company's name? _____	

**11. Please check the following box that best describes the total value of assets of Client #1 and Client #2 (the attorney just needs a general idea for the initial meeting):**

- Less than \$100,000   
 \$100,000 - \$500,000   
 \$500,000 to \$1,000,000   
 \$1,000,000 to \$2,000,000  
 \$2,000,000 to \$3,000,000   
 \$3,000,000 to \$4,000,000   
 \$4,000,000 to \$5,000,000   
 Over \$5,000,000

**12. Is there any person who may expect to benefit from your estate, and whom you plan to exclude from your estate? (i.e. Do you wish to “disinherit” anyone?) If so, whom?**

Client 1:	Client 2:

*\*Add additional pages if necessary*

13. Have you ever sold, given, or traded a portion of the real estate that you still own? If so, briefly describe the portion you have conveyed or traded.

Client 1:			
Beneficiary Name	Date	Simple Property Description	Value (Estimated)

*\*Add additional pages if necessary*

Client 2:			
Beneficiary Name	Date	Simple Property Description	Value (Estimated)

*\*Add additional pages if necessary*

14. In the last five years, have you given any of your assets to your children or anyone else, including money (cash or checks), vehicles, real estate, or personal property? This includes putting someone's name on a deed or vehicle title.

Client 1:			
Beneficiary Name	Date	Simple Property Description	Value (Estimated)

*\*Add additional pages if necessary*

**Client 2:**

<b>Beneficiary Name</b>	<b>Date</b>	<b>Simple Property Description</b>	<b>Value (Estimated)</b>

*\*Add additional pages if necessary*

15. Please use this space to elaborate on any answer you have given above, or to add any information or questions you would like to discuss with the attorney.

<b>Client 1:</b>	<b>Client 2:</b>

*\*Add additional pages if necessary*