

ESTATE PLANNING QUESTIONNAIRE

BOLT HOFFER BOYD

L A W F I R M

3340 NORTHDAL BLVD NW, SUITE 130, COON RAPIDS, MN 55448

PHONE: (763) 208-3707 FAX: (763) 208-3607

WWW.BOLTHOFFER.COM

PERSONAL INFORMATION

Husband's Full Legal Name _____
(Husband's name as it appears on most legal documents)

Also Known As _____
(Husband's name as it appears on any other documents)

Birth Date _____ Social Security # _____ US Citizen _____

Home Street Address _____

City _____ State _____ Zip Code _____ County _____

Cell Phone _____ Work Phone _____ Home Phone _____

Employer _____ Position _____

E-Mail _____

Please check the box if you would like us to communicate with you via E-mail

Wife's Full Legal Name _____
(Wife's name as it appears on most legal documents)

Also Known As _____
(Wife's name as it appears on any other documents)

Birth Date _____ Social Security # _____ US Citizen _____

Home Street Address _____

City _____ State _____ Zip Code _____ County _____

Cell Phone _____ Work Phone _____ Home Phone _____

Employer _____ Position _____

E-Mail _____

CHILDREN AND FAMILY MEMBERS

*(Please provide the following information for each child of yours,
whether biological, adopted, step or other)*

Child's Full Legal Name	Date of Birth	Address and Phone Numbers
		Home: _____ Cell: _____
		Home: _____ Cell: _____
		Home: _____ Cell: _____
		Home: _____ Cell: _____
		Home: _____ Cell: _____
		Home: _____ Cell: _____

KEY ADVISORS

*(Estate Planning often times requires a team approach.
Please provide the following information for key advisors in your life.)*

Relationship	Address	Phone Number
Attorney Name: _____ Type: _____		
Financial Planner Name _____		
Accountant Name _____		
Life Insurance Agent Name _____		
Other _____ Name _____		

ASSET LEDGER

*(Your Estate Plan may depend largely on the type and value of your assets.
Please take some time to fill this out to the best of your ability.)*

Real Estate

(Homestead, Cabin, Rental Property, Second Home, Timeshare, Land)

Type of Real Estate	Address or Location	Approximate Fair Market Value	Mortgage Note or Payoff Amount

Retirement Assets

(IRA, 401(k), 403(b), Roth-IRA, Pension, etc.)

Type of Account	Owner (Husband or Wife)	Current Value	Current Beneficiaries
			Primary _____
			Contingent _____
			Primary _____
			Contingent _____
			Primary _____
			Contingent _____
			Primary _____
			Contingent _____

Life Insurance

(Term, Whole-Life, Accidental Death and Dismemberment, Employer Sponsored Plans, Etc.)

Type of Account	Owner (Husband or Wife)	Death Benefit or Other Payout	Current Beneficiaries
			Primary _____
			Contingent _____

			Primary _____
			Contingent _____
			Primary _____
			Contingent _____

Banking and Other Accounts

(Checking, Saving, Money Market, Brokerage, Etc.)

Type of Account and Name of Financial Institution	Owner (Husband, Wife or Joint)	Current Amount	Payable on Death (Yes or No)

Titled Assets and Other Personal Property

(Vehicles, Boats, Trailers, ATVs, Jewelry, Antiques, Other Personal Property Exceeding \$5,000)

Type of Asset	Location	Approximate Current Value	Loan Amount

Please provide the approximate value of all assets owned by Husband and Wife. With any joint assets, please allocate half to Husband and half to Wife:

Husband's Total \$ _____ Wife's Total \$ _____

PLANNING FOR AFTER LIFE

Personal Representative

(This person will be in charge of handling your estate upon your death.)

Choice	Full Legal Name	Relationship to You	Address
<u>Husband</u> 1 st Choice			
<u>Husband</u> 2 nd Choice			
<u>Husband</u> 3 rd Choice			
<u>Wife</u> 1 st Choice			
<u>Wife</u> 2 nd Choice			
<u>Wife</u> 3 rd Choice			

Do you want to require your Personal Representative to have to post bond to act in his or her role? Yes No

Guardian

(This person will take care of your minor children at the time of your death)

Choice	Full Legal Name	Relationship to You	Address
1 st Choice			
2 nd Choice			
3 rd Choice			

Distributing Assets

(Please provide the general plan for how you want your assets distributed. You can include spouse, children, grandchildren, other family members, friends, charities, churches, etc. You can also think about percentages and back up plans.)
