

GIBSON&PERKINS,PC
Confidential Online
Estate Planning Questionnaire

1. Please provide your name and your spouse's name and your address

Your Name

Your Wife or Husband's Name

Your Address

2. Please provide a list of the people you want to inherit your property and what you want them to receive

If you have children, please provide their names and their ages

Is there any reason to treat children in a manner other than equally? For example, does any one of them have special needs or require additional financial support?

If you have minor children do you wish to create a Minor's Trust in your Will?

_____ Yes _____ No

Is there anyone else you would like to inherit your property, if so, please also list their relationship (brother, sister, friend, etc.) to you, and what you want to leave them

Who would you like to inherit your property if everyone you have named predeceases you?

3. Guardians

If you have minor children who is your first choice to serve as the Guardian of your children?

If that person is unable to serve - who is your second choice?

If you have selected a married couple – Who would you choose if they became divorced or separated?

4. Trustees

If you wish to create a Minor's Trust who is your first choice to serve as the Trustee of your Minor's Trust?

If that person is unable to serve- who is your second choice?

5. Financial Power of Attorney

Do you have a current Financial Power of Attorney? ____ Yes ____ No

Who is your first choice to serve as your Agent under your Financial Power of Attorney?

If that person is unable to serve- who is your second choice?

6. Medical Power of Attorney

Do you have a current Medical Power of Attorney? ____ Yes ____ No

Who is your first choice to serve as your Agent under your Medical Power of Attorney?

If that person is unable to serve- who is your second choice?

7. Living Will

Do you want to adopt a Living Will? ____ Yes ____ No

8. Executor

Who is your first choice to serve as your Executor?

If that person is unable to serve- who is your second choice?
