

LAW OFFICES OF
TEETERS HARVEY MARRONE & KAIER LLP

1835 MARKET STREET
PHILADELPHIA, PA 19103-2968

RALPH N. TEETERS
EDMUND L. HARVEY, JR.
EDWARD J. KAIER
LICIA M. AÑO MARRONE*
MEGAN E. O'ROURKE*

215.567.2030
FAX 215.567.0588

*Also Member New Jersey Bar

www.thlex.com

**Estate Planning Questionnaire
Couples**

	Date:_____
Name:_____	Name:_____
Home Address: _____ _____ _____	Municipality:_____ County:_____ Home Phone:_____
Email:_____	Email:_____
Business/Employer: _____	Business/Employer: _____
Office Phone:_____	Office Phone:_____
Soc Sec Number:_____	Soc Sec Number:_____
Date of Birth:_____	Date of Birth:_____
Place of Birth:_____	Place of Birth:_____
Citizenship:_____	Citizenship:_____

Education:

Education:

Marital Status

Children and Other Dependents

Name

Relationship

Date of Birth

Special Considerations Affecting any Child or Other Dependent

Assets
Approximate Values

	Name	Joint	Name
Real Estate:			
Home Less Mortgage			
Other Less Mortgage			
Tangible Personal Property:			
Items of Unusual Value			
Liquid Assets:			
Bank Account, Cash and Money Market Funds			
Stocks, Bonds and Mutual Funds			
Life Insurance on Life of:			
Business Interests:			
Other:			
Employee/Retirement Benefits:			
IRAs			
401(k)			
TIAA/CREF			
Other			
Totals			

Life Insurance Detail

Company	Face Amount	Term or Whole Life	Person Insured	Owner	Beneficiary
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Employee/Retirement Benefits Detail

Account	Value	Owner	Primary Beneficiary	Alternate Beneficiary
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**Interests in Estates or Trusts
and
Potential Future Inheritances**

Liabilities
(other than mortgages)

Other Advisors
(investment advisors, tax accountants, etc.)

Name	Type	Firm/Address

Other Persons to be Named in Estate Plan

Name	Relationship	Address

Digital Assets

Consider making an inventory of digital assets (online accounts) and associated usernames and passwords.

Documents Essential for Review

Please furnish, where relevant, copies of:

- Existing wills, trust agreements, powers of attorney and living wills
- Prenuptial agreements or divorce settlement agreements
- Wills or trusts created by others in which you have an interest
- Any prior Federal gift tax returns filed
- Partnership agreements, shareholder or buy-sell agreements for any closely-held business interests

Estate Planning Issues to Consider

Should you create trusts for each other instead of making outright gifts? Trusts may be desirable for a variety of reasons: (1) estate tax savings, if a couple is subject to Federal estate tax; (2) management considerations, if there is a need or benefit from administrative or investment support; or (3) a desire to insure that property ultimately goes to certain family members. If trusts seem worthwhile, is there enough property (other than retirement accounts) owned separately by each person to fund the trusts?

Are trusts needed for minor children? At what age or ages should children receive substantial assets outright?

Who should be Guardians of the Persons to supervise the upbringing of minor children?

Who should be Executor (to settle the estate) or Trustee (to administer ongoing trusts)? What individual or combination of individuals? Should a bank be considered for these duties?

Who should inherit if you are survived by none of your primary beneficiaries?

Do you want durable general and health care powers of attorney to appoint someone to act on your behalf in case of incapacity?

Do you want a living will to express your views about heroic medical measures?

Do you want to leave a letter or memorandum of instructions to family about funeral, cremation or burial arrangements? Such instructions are best made outside of a will, which would not be probated until after the funeral has taken place.