

LARRY E. CIESLA

ESTATE PLANNING QUESTIONNAIRE - MARRIED

Date _____

Whom may we thank for the referral to our office? _____

Do you have old wills? Yes _____ No _____ (Please bring copies with you)

PERSONAL INFORMATION

1. Name _____ Name _____
(Husband) (Wife)

2. Address _____
County in which you reside _____
Other counties/states in which you own real estate _____

3. Date of marriage _____
Prior marriages? (H) Yes _____ No _____ (W) Yes _____ No _____
Do you have a nuptial agreement? Yes _____ No _____ (Please bring copy with you)
Have you ever lived in Arizona, California, Idaho, Louisiana, New Mexico, Texas, Washington or Wisconsin? Yes _____ No _____

4. Contact Information: Home Phone # _____
(H) Work _____ (W) Work _____
(H) Cell _____ (W) Cell _____
Email: (Husband) _____
(Wife) _____

	HUSBAND	WIFE
5. Date of birth:	_____	_____
6. Place of birth	_____	_____
7. Social Security Number	_____	_____
8. Occupation	_____	_____
Retired?	Yes ___ No ___	Yes ___ No ___

9. Children; next of kin; or beneficiaries (Please list all children; grandchildren; next of kin; and unrelated persons you may wish to name as beneficiaries of your estate, including children from prior marriages):

<u>Names and addresses</u>	<u>Relationship</u>	<u>Dates of Birth for children (or grandchildren)</u>

(You may attach additional pages)

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10. Do you have any relatives (other than children) dependent upon you for support?
 Yes _____ No _____
 If yes, describe _____

	HUSBAND	WIFE
11. Preferred funeral home?	_____	_____
12. Cremation?	Yes ___ No ___	Yes ___ No ___
13. Preferred cemetery	_____	_____
14. Do you have a pre-paid funeral plan? Yes ___ No ___		

GOALS AND OBJECTIVES

1. Whom do you wish to name as your personal representative (executor)?
 (H) _____ (W) _____

If person(s) named above cannot serve for any reason, who would be your next choice?
 Name _____
 Relationship to you _____
 Address _____

2. Name of guardian for any minor children?
 Name _____
 Address _____
 Relationship to you _____

3. Whom do you wish to receive your tangible personal property (furniture, jewelry, clothing, automobiles, etc.)
 First to Spouse Yes ___ No ___
 Then to: _____
 Children in equal shares? Yes ___ No ___
 A specific child? Who? _____
 A named individual? Who? _____
 Address _____

4. Do you wish to make any specific gifts of property or money? Yes ___ No ___
 I wish to give: _____ to _____
 I wish to give: _____ to _____
 I wish to give: _____ to _____

5. Whom do you wish to receive the balance of your estate?
 (1) Spouse Yes ___ No ___
 (2) Others: _____
 Child (name) _____
 Children equally? _____

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6. Any beneficiaries other than spouse or children?

(Give fractions or percentages where more than one beneficiary)

7. Does any beneficiary have any special needs (e.g., education not yet completed, is still a minor, has ongoing health concerns) so that you want additional information regarding a trust for their shares of the estate? Yes ____ No ____

8. Would you like information regarding:
Living Will (a document indicating that you do not want unnecessary life support system)? Yes ____ No ____
Durable Family Power of Attorney? Yes ____ No ____
Living Trust? Yes ____ No ____

9. Have you established any trusts? Yes ____ No ____
If yes, attach a copy and state current value \$ _____

10. Are you the beneficiary of any trust? Yes ____ No ____
If yes, attach a copy and state current value \$ _____

11. Do you have any obligations under a divorce decree from a prior marriage? _____
If yes, attach a copy.

12. Do you hold a power of appointment granted to you by another person in a trust?
Yes ____ No ____

ASSET INFORMATION

1. **BANK** Name _____

<u>Location</u>	<u>Account #</u>	<u>Type of Account</u>	<u>Approximate Value</u>
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BANK Name _____

<u>Location</u>	<u>Account #</u>	<u>Type of Account</u>	<u>Approximate Value</u>
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BROKERAGE Account with _____

<u>Location</u>	<u>Account #</u>	<u>Type of Account</u>	<u>Approximate Value</u>
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2. **SAFE DEPOSIT BOX:** Location Name(s) on Box

3. **REAL ESTATE:**
Location Name(s) on Deed Approximate Value

Home _____

Other _____

4. **LIFE INSURANCE POLICIES:**
Insured Name of Company Beneficiary Contingent Beneficiary (if any) Value

5. **PRIVATELY HELD STOCKS/BONDS:**
Name(s) on _____

Company Where Located Certificates? Approximate Value

Name of CPA _____ Phone # _____

Name of Financial Advisor _____ Phone # _____

Name of Insurance Agent _____ Phone # _____

6. Have you made any gifts over \$10,000.00 per year to a beneficiary or for which you filed a gift tax return? Yes _____ No _____

7. **AUTOMOBILES:**
Year & Make Name(s) on Title

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8. Do you have any debts that are secured by any assets (e.g., automobile loan, real estate mortgage, etc.)? Yes ____ No ____

	What Asset is Held as Security?	Credit Life Insurance?
<u>Name of Lender</u>		

9. **ANNUITIES:**

Are you receiving (or do you anticipate receiving) annuity payments? _____

If yes, to whom are payments made? _____

Is this an annuity for life? _____

Will payments continue after your death (sometimes referred to as a "joint and survivor" annuity)? _____

10. **RETIREMENT PLANS:**

Have you participated in a plan maintained by an employer that will provide benefits upon your retirement or death? Yes ____ No ____

If yes, attach a copy of your most recent statement.

If yes, have you executed designation of beneficiary forms? _____

If yes, attach copies of designation of beneficiary forms.

Do you have any IRA, Roth IRA, SEP IRA or other similar retirement plans?

Yes ____ No ____

If yes, attach copies of your designation of beneficiary form and most recent account statement.

11. **FOREIGN PROPERTY:**

Do you own any property in a foreign country? Yes ____ No ____

If yes, please describe _____

12. **BENEFICIARY CONCERNS:**

Do you have any concerns regarding the ability of a beneficiary of your estate to prudently manage his or her inheritance? Yes ____ No ____

If yes, please explain _____

13. **DEBTS:**

List any significant debts other than secured debts set forth in Section 8 above:

LAW OFFICE OF
LARRY E. CIESLA

ESTATE PLANNING QUESTIONNAIRE - MARRIED

THE FOLLOWING WILL BE COMPLETED AT OUR INITIAL CONSULTATION:

Your signature below confirms the engagement of the Law Office of Larry E. Ciesla as legal counsel for you in the preparation of the following estate planning documents:

_____ Revocable Trust Agreement(s)
_____ Last Will(s) and Testament(s)
_____ Durable Power(s) of Attorney
_____ Living Will & Health Care Surrogate Designation(s)
_____ Deed(s)
_____ Other _____

The attorney's fee referenced below includes any meetings or telephone conferences, the drafting of your documents and related correspondence, and written instructions and assistance regarding the funding of your trust, if any. The fee excludes actual out-of-pocket expenses such as clerk of court fees for recording deeds (usually \$27.70 per deed), which will be charged in addition to the fee quoted.

In consideration of the legal services we render to you, the fee is due at the earlier of (i) 60 days after our office sends out the initial drafts of your documents; or (ii) at the time the documents are executed.

It is further understood that this agreement does not cover any fees for professional services other than those listed above and that if additional services are needed you will be billed separately for them.

ATTORNEY'S FEE: Flat Fee \$ _____
 Hourly Fee @ \$ _____ per hour

TIME FRAMES: STANDARD - Attorney will provide drafts of documents within 30 days of initial conference, and documents will be revised as necessary and executed within 60 days of initial conference
 RUSH - Documents will be executed on or before (date)

LARRY E. CIESLA

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MARRIED COUPLE CONFLICT PROVISION:

You have asked that the LAW OFFICE OF LARRY E. CIESLA prepare estate planning documents for both of you. Because we will be representing both of you, and each of you is considered our client, the Florida Bar imposes certain ethical restrictions concerning joint representation which are described in the following paragraphs.

We will not disclose any information concerning either of you to third parties without your consent. Our duty to keep your information confidential also precludes us from disclosing any information that one of you may ask us to keep confidential. If either of you asks us to keep anything confidential from the other (which information could adversely affect the other in any manner or which does or could present a conflict between the two of you) we will withdraw from representing both of you. In that regard, we will not give any legal advice to either of you or make any changes in any of your estate planning documents that may adversely affect the other without your mutual knowledge and consent.

If the two of you have a difference of opinion concerning the proposed plan for the disposition of your property, we will try to point out the pros and cons of such differing opinions. However, we cannot advocate one of your positions over the other. Furthermore, we would not be able to advocate one of your positions versus the other if there is a dispute at any time as to your respective property rights or interest as to other legal issues between the two of you. If actual conflicts do arise between you of such a nature that, in our judgment, it is impossible for us to perform our ethical obligations to both of you, it would become necessary for us to cease acting as your joint attorney.

If you agree to the terms of our engagement, please sign below where indicated.

ACCEPTED BY:

LAW OFFICE OF LARRY E. CIESLA

CLIENT
Date: _____

By: _____
LARRY E. CIESLA
Date: _____

CLIENT
Date: _____

LARRY E. CIESLA

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COMPLETION OF ENGAGEMENT AND FILE RETENTION POLICY

The scope of this engagement shall be deemed completed at the time your estate planning documents are executed; deeds recorded; and written instructions conveyed to you regarding funding of your trust, if applicable. We will then have no further duty or obligation to provide you with any further services, including but not limited to alerting you to future changes in the law. We hope you will contact us with regard to any legal needs or questions you may have in the future (which would, of course, be the subject of a new engagement agreement).

It is our policy to deliver the originals of all executed estate planning documents to our clients unless, based on special circumstances, a client wishes to leave the originals in our possession. We keep copies of all executed estate planning documents in our client files. It is our policy to retain all estate planning files indefinitely (in other words, we do not ever destroy estate planning files). We do, however, reserve the right to charge an administrative fee for retrieving, copying and delivering the file to the client or the client's agent if requested in the future.

We occasionally receive document requests from third persons, such as a family member while a client is alive or a lawyer representing a family member after a client's death. We are under an ethical duty to maintain the confidentiality of your estate planning documents during your lifetime and after your death, unless disclosure is court authorized, or under certain circumstances if we determine that it would be in your best interest to release copies of your documents. However, you have the right to prevent us from ever releasing your documents except when court authorized.

- I direct that copies of my estate planning documents be released only when court authorized.
- I authorize the release of copies of my estate planning documents to third parties such as a family member while I am alive or a lawyer representing a family member after my death, if the LAW OFFICE OF LARRY E. CIESLA determines that release of the documents would be in my best interest.
- I hereby authorize the LAW OFFICE OF LARRY E. CIESLA to release copies of my estate planning documents upon request at any time by _____, and I hold the LAW OFFICE OF LARRY E. CIESLA harmless for the release of my documents to the above-named person(s).

Date _____

Client

Date _____

Client