



SECKELMAN & ASSOCIATES

A PROFESSIONAL CORPORATION

Attorneys-At-Law

CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE FOR LIVING TRUST DOCUMENTS

This questionnaire is designed to provide Seckelman & Associates with the pertinent information and data necessary to complete your Living Trust Documents. Please fill in all spaces provided in the following pages. If a particular question is not applicable, please so indicate. Also, please do not hesitate to add additional information.

NOTE: Do not send via internet. Instead print out this document, complete the questions and bring with you at your appointment with Seckelman & Associates.

Husband's Personal Data

Last Name: _____ First: _____ Middle: : _____

Birth Date: _____ Birthplace: _____

U.S. Citizen? Y N SSN: _____

Residence:

Street: _____

City: _____ State: _____

Phone (H): _____

Legal Residence:

State: _____ County: _____

Occupation:

Title: _____

Company name: _____

Company Address: _____

Phone (O): _____ Ext: _____ Fax: _____

E-mail: _____

Wife's Personal Data

Last Name: _____ First: _____ Middle: : _____

Birth Date: _____ Birthplace: _____

U.S. Citizen? Y N SSN: _____

Residence:

Street: _____

City: _____ State: _____

Phone (H): _____

Legal Residence:

State: _____ County: _____

Occupation:

Title: _____

Company name: _____

Company Address: _____

Phone (O): _____ Ext: _____ Fax: _____

E-mail: _____

Size of Your Estate (Net Worth)

Is your estate worth over \$675,000? Y N

Marriage

Marriage Date: _____ Place of Marriage: _____

Date of California Residency: _____

Children of this marriage

Name	Birth Date	Birth Place
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Prior Marriage - Husband

Former Spouse: _____

Date and Place of Death: _____

Date and Place of Divorce: _____

Children of former marriage

Full Name	Birth Date	Birth Place
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Prior Marriage - Wife

Former Spouse: _____

Date and Place of Death: _____

Date and Place of Divorce: _____

Children of former marriage

Full Name	Birth Date	Birth Place
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Design Data

1. Who do you wish to name as your successor trustee?

1st Choice: _____

2nd Choice: _____

3rd Choice: _____

2. Who do you wish to be conservator of the person of the wife and to be responsible for her health decisions if she became incapacitated?

1st Choice: _____

2nd Choice: _____

3rd Choice: _____

3. Who do you wish to be conservator of the person of the husband and to be responsible for his health decisions if he became incapacitated?

1st Choice: _____

2nd Choice: _____

3rd Choice: _____

4. Should husband and wife die in a common disaster, whom do you desire to become guardians of your minor children?

1st Choice: _____

Street: _____

City: _____ State: _____

2nd Choice: _____

Street: _____

City: _____ State: _____

5. All assets not listed as separate property are assumed to be jointly owned as community property.

List all assets which are intended to be separate property of the **husband** (item description only). Provide address of real property and account numbers for bank accounts, broker accounts and other assets):

List all assets which are intended to be separate property of the **wife** (item description only). Provide address of real property and account numbers for bank accounts, broker accounts and other assets):

6. Distribution of personal property upon death of both Husband and Wife or upon death of a single person.

Upon your death, to whom do you desire to leave your personal property (furniture, furnishings, jewelry, art, automobiles)?

Check one:

- Option 1. Outright to children equally
- Option 2. Other beneficiaries (please describe)

7. Cash bequests.

Do you desire to leave cash to specific beneficiaries? Y N

Name	Amount
_____	_____
_____	_____
_____	_____
_____	_____

8. Specific Bequests

Are there any special assets which you desire to give to specific beneficiaries?

Y N

Name	Asset
_____	_____
_____	_____

9. Residue of the Estate

After the above referenced distribution is made, to whom do you desire to leave the remaining balance of your estate?

Check one option:

___ Option 1. Outright equally to living children and then to grandchildren upon children's deaths

___ Option 2. Outright to the following individuals in the following percentages. (please describe)

Name	Percentage
_____	_____
_____	_____
_____	_____
_____	_____

___ Option 3. Any other distribution of your choice (please describe)

10. Alternative Beneficiaries

In the event that all of your beneficiaries named in paragraph 9 above were to predecease you, then to whom do you desire that your assets be distributed?

Husband's assets to:

Wife's assets to:

