



Steven J. Kasyjanski
Attorney at Law

49 Boone Village, #178
Zionsville, Indiana 46077

(317) 719-5037

steve@sjk-law.com

Dear Estate Planning Client:

The following is my estate planning questionnaire that I use as my basic starting point for all estate planning matters. This is by no means an exhaustive list of information required and pertinent but is generally a good starting point as we work together to assist you with your planning.

ESTATE PLANNING QUESTIONNAIRE

I. PERSONAL INFORMATION

NAME _____
(d/o/b) _____
(d/o/m) _____

SPOUSE'S
NAME _____
(d/o/b) _____

CHILDREN
(d/o/b) _____ (name) _____
(d/o/b) _____ (name) _____
(d/o/b) _____ (name) _____
(d/o/b) _____ (name) _____
(d/o/b) _____ (name) _____

If any child(ren) is married and/or has children please state their name, spouse's name, address, phone number and number of children on a separate paper.

HOME ADDRESS: _____

II. FINANCIAL INFORMATION

Please attach a Financial Statement with as much information as you are comfortable providing in the following categories – basically “round” numbers on value:

- A. REAL ESTATE
- B. TANGIBLE PERSONAL PROPERTY
- C. INTANGIBLE PERSONAL PROPERTY
- D. LIFE INSURANCE (Please designate whether whole life or term)
- E. RETIREMENT ACCOUNTS
- F. JOINTLY HELD PROPERTY WITH ANY PERSON OTHER THAN YOUR SPOUSE
- G. CUSTODIAL ACCOUNTS FOR MINOR CHILDREN

***Please indicate all beneficiary designations.**

III. YOUR ESTATE TEAM

Please consider the following persons or institutions to assist you:

1. EXECUTOR OF YOUR WILL (Person that would assist in the administration of your estate.) Often a spouse or an adult child is designated. It is a position of trust and not merely a “honorary” position. It is also hard work. A good knowledge of your family priorities, and a business sense along with “people skills” is often helpful.

2. SUCCESSOR PERSONAL REPRESENTATIVE.

3. TERTIARY PERSONAL REPRESENTATIVE.
(Often a Bank as a “fall back” position.)

4. TRUSTEE. (If you are considering a Trust, a Trustee should be selected.)

5. POWER OF ATTORNEY. This person would be able to act on your behalf during your lifetime. A Power of Attorney can be limited or very broad. It is a position of significant Trust.

6. HEALTHCARE REPRESENTATIVE. This person would act to make health and medical decisions for you if you are unable to do so. Again this person should know you very well and you should have significant confidence in their ability to make decisions on

your behalf.

7. GUARDIAN OF YOUR ESTATE.

If a Guardianship would become necessary this would be the person who would handle your financial affairs.

8. GUARDIAN OF YOUR PERSON. If a Guardianship is necessary this would be the person who would assist in caring for you and make some decisions on your behalf.

9. GUARDIAN OF YOUR MINOR CHILDREN. If you (and your spouse) were to pass away this is person who would care for your child(ren).

10. ACCOUNTANT.

11. PRIMARY HEALTHCARE PROVIDER (PHYSICIAN).

IV. BENEFICIARY DESIGNATIONS.

On a separate sheet of paper, please list those who you would like to inherit in the event of your death. You should think through at least two and possibly more steps. As an example is you are married and your spouse predeceases you, who would you want to be your beneficiary? You also have the ability to make specific bequests, which could be items of tangible personal property or money. You can devise specific amounts or you can give your beneficiaries a percentage.

For each beneficiary please be as specific, and formal, as possible. For instance please state the beneficiary as "My Brother, Joseph James Smith, of Boone County, Indiana" and not as just simply "Joe".

V. CHARITABLE BEQUEST.

You should consider whether or not, at some point in your planning, if you would like to make a charitable bequest. Those institutions should be listed specifically on a separate page. I can assist you in finding the appropriate information for the charitable organization as many charitable organizations have very specific requirements in how they are to be named as beneficiaries.

Please take your time and complete as much information as possible. It is not necessary to have every bit of information in place nor is it important to have every decision finalized. Every client is unique, every situation is different, every family is different, and therefore every plan can and should be different. The more detailed and complete the information is that you provide, the better that I am able to help you to customize your estate plan for your unique circumstances. Please supplement any information as it becomes available. Please return this information to me, so that I can review it. I would be happy to meet with you to discuss any questions you may have.

Thank you for allowing me to assist you in these matters.

Sincerely yours,

Steven J. Kasyjanski, Esquire