

**LAW OFFICE OF
JUDSON H. SHUTT**

167 Conestoga Road – Suite A, Wayne, PA 19087

Tel (610) 688-1656
e-mail: jshutt@shuttlaw.com

Fax (610) 687-9266
www.shuttlaw.com

ESTATE PLANNING QUESTIONNAIRE

The following questions have been prepared for you to use as general guidelines in examining your estate planning status. Completing the form to the best of your ability enables you to outline your wishes and intentions and will enable us to have a more productive dialogue as we specifically draft your estate planning documents. Please attach copies of any documents which are relevant.

1. Do you have an existing Last Will and Testament, Power of Attorney, Medical Directive or other estate planning documents? If so, what documents?

2. Have you organized your insurance policies, estate planning documents and other important papers in one location? When did you last review these documents to ensure their accuracy?

3. Have you calculated the monetary value of all your assets?

4. Do you have a safe deposit box? If so, where is it located and in what names is it maintained?

5. In general, what ideas do you have as to how you want your estate distributed among your beneficiaries?

6. Are you currently married? Have you and your spouse entered into a pre-nuptial or post-nuptial agreement?
7. Are there children from a current and/or previous marriage? If so, what are their names and ages and with whom do they reside?
8. If married previously, are there any continuing rights and/or obligations arising pursuant to any property settlement agreement or divorce decree? If so, what are those obligations?
9. Is there anyone for whom you are financially responsible or to whom you wish to leave a specific part of your estate? If so, whom?
10. Do you wish to make any charitable gifts in your Will? If so, to whom?
11. Do you have any specific property you wish to give to a specific person(s)? If so, what and to whom?
12. Do you have any specific preferences as to funeral, burial and/or anatomical bequests? If so, what preferences?
13. Do you want assets to pass to your spouse, if applicable, upon your death?
14. Do you want assets to pass to your children, if any? If so, do you want those assets to be held in trust until a specific age and/or the occurrence of specific events? If so, what ages and/or events?

15. If assets are to be held in trust, how do you ultimately want the assets distributed to the trust beneficiaries?
16. Who do you want, if applicable, as the Trustee(s) to be of any trusts established in your will?
17. If you have children under the age of eighteen (18) years old, who do you want to raise the children as Guardian if something happens to you and your spouse?
18. Do you wish to pass assets to any person with special problems, such as physical or mental disabilities? If so, what assets and to whom?
19. Who do you want to be the Executor/Executrix of your estate?
20. Have you made any gifts (outright or in trust) exceeding \$13,000 per year to any person?
21. Do you expect to receive a significant inheritance in the future?
22. Do you wish to grant someone a Power of Attorney if something happens to you and your spouse that does not allow you to handle your affairs?
23. Do you wish to have a Medical Directive relating to medical decisions in the event you are unable to make those decisions?

24. Do you have any Power of Attorney, Power of Appointment or other interests under a Will or Trust created by someone else? If so, what interests?

25. Are there are any specific concerns you have related to your estate planning? If so, please list those concerns.

26. Attached please find an Asset Calculator to assist in ascertaining your potential estate assets.

ASSET CALCULATOR

Category	Item	Probate/ Non Probate	Taxable/ Non Taxable	Total Asset Value	Estate Value	Non Estate Value
REAL ESTATE		P	T			
PERS. PROP		P	T			
Autos						
Clothing						
Household Items						
Jewelry						
Misc. Items						
BANK ACCTS/CASH		P	T			
CD'S		P	T			
EE BONDS		P	T			
LIFE INS.		NP	Fed-T/PA- NT			
MUTUAL FUNDS		P	T			
STOCKS/BONDS		P	T			
ANNUITIES		NP	T			
IRA'S		NP	T			
MISC.						
				TOTAL		