



DASARO LAW FIRM, PC

Estate Planning Questionnaire

The purpose of this Estate Planning Questionnaire is to provide our Firm with the important information to design an estate plan and allow us to prepare your documents. After you complete this Questionnaire, please call us at (732) 671-7007 to schedule a meeting to discuss and review.

I. Personal and Family Information

Client Information:

Full Name: _____

Home Address: _____

Street Address

City

State

Zip Code

County

Date of Birth: _____ **Phone Number:** _____

Occupation: _____ **U.S. Citizen:** yes no

Have you been married previously? yes no

(In the case of divorce, please supply a copy of the divorce decree or describe any ongoing obligations)

Have you entered into a pre-marital or post-marital agreement? yes no

(If yes, please provide a copy)

Spouse Information (if applicable):

Full Name: _____

Home Address: _____

(if different than above)

Street Address

City

State

Zip Code

County

Date of Birth: _____ **Phone Number:** _____

Occupation: _____ **U.S. Citizen:** yes no

Have you been married previously? yes no

(In the case of divorce, please supply a copy of the divorce decree or describe any ongoing obligations)

Have you entered into a pre-marital or post-marital agreement? yes no

(If yes, please provide a copy)

Children’s Information (if applicable):

If you have children, please state each child's name, sex, date of birth, and relationship:

<u>Full Name</u>	<u>Sex (M/F)</u>	<u>Date of Birth</u>	<u>Relationship (biological, adopted, step)</u>

Do any of your children have disabilities or special needs? yes no

If yes, please describe:

If you have any others to consider in your estate plan (grandchildren, other family members, friends, etc.)? Please list their names, addresses and relationship below:

II. Estate Planning Objectives

The answers to the following questions will help us determine which estate planning vehicles will best allow you to achieve your estate planning objectives. If you have current wills, trust agreements, powers of attorney, or other estate planning documents, please bring them with you to your appointment.

1. At your death, please describe how you want your property to be distributed:

- a. If your spouse survives you?

- b. If you spouse **does not** survive you and your children survive you? (e.g. equal shares to your children?)

- c. If a child should predecease you, how do you want the predeceased child’s share distributed? (e.g. to the deceased child’s descendants?)

- d. In the event your spouse and all of your children and descendants fail to survive you, how do you want your property distributed?

2. If your spouse survives you, do you want to leave the assets to your spouse outright and trust that they will leave them to your children? yes no

3. In regards to distributions to any minor-aged beneficiaries; until what age would you like for their share to be under the control of the Trustee? Please state the ages you want the property in trust distributed outright to your minor heirs.

4. Do you want to make any charitable gifts at your death? yes no
If yes, please describe:

5. Do you wish to specifically disinherit any of your children, grandchildren or other relatives? yes no If yes, please elaborate:

6. Do you wish to leave any items of property (such as jewelry or cash) to certain persons? yes no If so, please complete table below.

Item	Identifying Feature	Recipient

7. Please use the following space to note any questions or ideas that may have occurred to you that don't necessarily fit within any of the items mentioned in this Questionnaire.

III. **Fiduciaries to Manage your Financial Affairs and Estate**

Executors, Guardians, Trustees, and Attorney-In-Fact are referred to as “fiduciaries”. Generally, a fiduciary is an individual entrusted with the safekeeping, management, and administration of your affairs.

- 1. Executor** – An Executor is responsible for collecting the assets of your estate, carrying out the direction contained in your will, ensuring that your will is properly probated, and filing any tax returns which may be due. You should consider who might best handle these responsibilities, based upon the nature and complexity of your estate and the qualifications of those you would consider. You should name alternates in case your choice is unable to serve at the time of your death. *Most clients appoint their spouse to serve as first choice. Please state your choices.*

First Choice: _____

Second Choice: _____

Third Choice: _____

- 2. Guardian** (*complete only if you have minor children or anticipate having minor children*) - A guardian assumes responsibility for your minor children in the event that both parents die before your children become adults. You should name one or more successor guardians in case the first is unable to serve. The guardian does not have to be the same person who would manage finances for your children. Please consider who might be best able to raise and care for your children. If you choose a married couple to serve together as guardian, consider your wishes in the event they divorce or if one of them dies. *Please state your choices.*

First Choice: _____

Second Choice: _____

Third Choice: _____

- 3. Trustee for Minors** – The Trustee for Minors will be responsible for investing any assets held in trust for minor beneficiaries, preserving such assets for the minor beneficiaries of the trust, and distributing such assets to the minor beneficiaries according to the directions contained in any trust agreement which you might execute. When choosing a trustee, you should consider their ability to invest and manage finances. You should name an alternative in the event your first choice is unable to serve.

Most clients appoint their spouse to serve as first choice. Please state your choices.

First Choice: _____

Second Choice: _____

Third Choice: _____

4. **Attorney-In-Fact** – Your attorney-in-fact will manage your business and financial affairs during your **lifetime** (e.g. paying your bills, filing taxes, making investments). The attorney-in-fact operates under either a “Durable Power of Attorney” that takes effect immediately or a “Springing Power of Attorney” that only takes effect if and when you become disabled. When choosing an attorney-in-fact, you should consider someone with knowledge of your finances and their ability to manage such. You should name an alternate in the event your first choice is unable to serve. *Most clients appoint their spouse to serve as first choice. Please state your choices.*

First Choice: _____

Second Choice: _____

Third Choice: _____

5. **Agent for Advance Medical Directive** – Your agent will be responsible for personal and medical decisions for you if you are incapacitated and cannot do so yourself. You should consider alternates in case your first choice is unable to serve. *Most clients appoint their spouse to serve as first choice. Please state your choices.*

First Choice:

Full Name: _____

Address: _____

Relationship: _____ Phone Number: _____

Second Choice:

Full Name: _____

Address: _____

Relationship: _____ Phone Number: _____

Third Choice:

Full Name: _____

Address: _____

Relationship: _____ Phone Number: _____

Please select the Estate planning documents you wish for us to prepare:

Last Will & Testament (starting at \$750)

This legal document expresses your wishes as to how your property/assets are to be distributed after your death and as to which person/persons are to manage the property/assets until its final distribution.

Living Will-Advanced Directive and Medical Power of Attorney (\$150 each)

These legal documents explain how you want medical decisions about you to be made if you cannot make the decisions yourself. An Advance Directive is meant to help you plan ahead and let others know what kind of care you want. It is used to guide your loved ones and health care team in making clear decisions about your health care if you can't make medical decisions by yourself. These medical decisions may include special actions or emergency care from your health care team. Advance directives only apply to health care decisions and do not affect financial or money matters.

Durable Power of Attorney (\$150)

This document authorizes another person to handle your financial matters. The authorized individual, or "attorney-in-fact", can be given control over all or a part of the your personal and/or business finances.

We offer a discount for the full-estate planning package, which is all documents listed above.

Adult Child/College Student Package (Starting at \$750)

This package includes a Living Will, Advance Directive with Medical Power of Attorney, Durable Power of Attorney, FERPA & HIPPA. These documents will assist you and your adult children who are attending college in the event of a medical emergency, or in the event you would need to obtain financial information, health and/or school records.

After your consultation, we will draft your documents and forward to you via email for your review. Upon acceptance, we will schedule an appointment to have the documents witnessed and notarized (this appointment requires the Attorney and 2 staff witnesses).

A minimum of 50% payment will be due prior to drafting any documents. Any balances are to be paid in full at the time of your signing appointment.

EMAIL ADDRESS: _____