

THE GILROY LAW FIRM

Tracy Gilroy Attorney at Law
STANWOOD WA
360-969-9094

ESTATE PLANNING QUESTIONNAIRE

NAME: _____ DATE: _____

I. Family Information:

1. Name (Yours) _____ Date of Birth _____
State/County of Residency (where you VOTE) _____
Home Address: _____
Work Address: _____
Main Phone: _____ Alternative Phone: _____
Email(s): _____
Social Security No: _____
Occupation/Position: _____

2. Name (Spouse or S.O.) _____ Date of Birth _____
State/County of Residency (where you VOTE) _____
Home Address: _____
Work Address: _____
Main Phone: _____ Alternative Phone: _____
Email(s): _____
Social Security No: _____
Occupation/Position: _____

3. **MARRIAGES:** Names, Dates, States, Agreements (Pre & Post Nuptial)
Community Property per Statute / Agreement (Recorded?)
Documentation of Divorce Decree or Separation Agreement

4. **CELEBRATION OF LIFE: Desires**

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5. CHILDREN/OFFSPRING: (use other spreadsheet if desired)

List your children (full or half blood or adopted) in age and birthdate order.

List all of their spouses and children. Note if the child is from a previous marriage. Use “GC” (to denote grandchild) and “GGC” (to denote great grandchild)

NOTE if anyone needs special care and you want to assist them.

<u>FULL Name</u>	<u>Birthdate</u>	<u>Blood ½ or full/ Or Adopted</u>	<u>Spouse? Name (list all)</u>	<u>Children? Name & AGE</u>
Ex: Mary Scott Lane	10-30-1980	“Adopted”	Yes in 1999 Divorced in 2000 Remarried in 2005	Charolette (GC) (20) (adopted in 1 st marriage) Robert (GGC) (1 yr) (adopted)
Ex: Lawrence Lane	10-30-1997	½ blood Other Parent: Robert (1 st)	No	Lottie (GC) Adopted (1 yr.)

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6. SIBLINGS (Note if full or half-blood or step sibling.)

List your siblings in age and birthdate order and note whether full, ½ blood or adopted.

List their children and grandchildren if known. (Note whether Niece/Nephew or GreatN/N)

NOTE if anyone needs special care and you want to assist them.

<u>Name</u>	<u>Date of Birth</u>	<u>Blood ½ or full/ Or Adopted</u>	<u>Spouse?</u>	<u>Niece/Nephew Name & Age</u>
Ex: Scott Lane	10-30-1980	“Adopted”	Yes in 1999 Then divorced in 2000 Remarried in 2005 (List all spouses)	
Ex: Lilly Lane	10-30-1998	½ blood Other Parent: Robert (1 st)	No	

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II. YOUR ADVISORS

	<u>Name</u>	<u>Address, Phone & Email</u>
Accountant	_____	Email: _____ _____ _____ (____) _____ _____
Investment or Financial Advisor	_____	Email: _____ _____ _____ (____) _____ _____
Life Insurance Agent(s)	_____	Email: _____ _____ _____ (____) _____ _____
Lawyer	_____	Email: _____ _____ _____ (____) _____ _____
Other	_____	Email: _____ _____ _____ (____) _____ _____

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III. LOCATION of YOUR IMPORTANT DOCUMENTS (Wills, Deeds, etc.):

1. Safe Deposit Box: YES/NO Location: _____

Access Key Location Known by Another: YES/NO

Other Location? _____

2. DIGITAL Information:

User Name/Passwords Written Down: Yes/NO

Locations: _____

3. Inventory of Assets/Accounts: YES/NO (Use Lists Herein if None Drafted)

4. Are You an Agent/Trustee for anyone, e.g. a minor child/a sibling's child?
YES/NO

If so: Explain: _____

IV. AGENTS of YOUR ESTATE: These terms are used regularly

“Personal Representative” manage a Decedent’s Will

“Trustee” manages a Grantor’s or Trustor’s Trust

“Attorney-In-Fact” has power to act for Grantor in “Power of Attorney” docs.

“Guardians” (Care for Person) -Court Appointed Power of Attorney

“Conservators” (Care for Estate of Person) - Court Appointed Power of Atty.

(Note: 2021 Uniform Guardian, Conservatorship & Other Protect Arrange Act)

ON THE NEXT PAGES:

LIST Responsible Persons to serve in the following Positions, if relevant.

LIST more than one, if possible.

LIST in Preferential Order

CONSIDER whether Persons serve individually or with another.

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A. Personal Representatives (“P.R.”)– AGENT to MANAGE YOUR WILL

Please indicate below your choices of Individuals/Companies to serve as “P.R.”

	Your Will	S.O.’s Will
First Choice	_____	_____
Successor(s), in Order to Serve	_____	_____
	_____	_____
	_____	_____

B. Trustees – AGENT to MANAGE TRUST per Trust Provisions

There are many types of Trusts. Two common trusts are:

- (a) **Testamentary Trust** activates at your death; the Trust’s terms are in your Will.
- (b) **Living Trust (revocable or irrevocable)** activates upon Funding, either during your Life or in your Will. These Trusts can dispose of assets without a Court or Probate Ct. Irrevocable Living Trusts protect assets from personal creditors and allow for benefits to be enjoyed by the Grantor even though the Grantor may also be a Beneficiary.

Please indicate Individuals or the Trust Company to serve as Trustee(s) below:

	Your Trust	S.O.’s Trust
First Choice	_____	_____
Successor(s), in Order to Serve	_____	_____
	_____	_____
	_____	_____

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C. Attorneys in Fact – To MANAGE - YOUR HEALTH CARE DIRECTIVE

Please indicate below the persons you wish to serve in this position:

	Your Health Care	S.O's Health Care
First Choice	_____	_____
Successor(s), in Order to Serve	_____	_____
	_____	_____
	_____	_____

D. Attorneys in Fact – To MANAGE - YOUR FINANCIAL MATTERS

Please indicate below the persons you wish to serve in this position:

	Your Financial Matters	S.O's Financial Matters
First Choice	_____	_____
Successor(s), in Order to Serve	_____	_____
	_____	_____
	_____	_____

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- V. **SCHEDULE OF ASSETS AND LIABILITIES (List Assets with Debts)**
BE CERTAIN OF OWNERSHIP – check Titles and Deeds and Bills of Sale.
BE CERTAIN TO USE “Pay On Death” or “Transfer On Death” if available.

<u>ASSET</u>	<u>OWNER</u>	<u>BENEFICIARY or Pay on Death</u>	<u>VALUE / DEBT</u>
Savings Acct			
Checking Acct			
Stocks, Bonds Notes & Investments			
IRA/Retirement Acct			
Business/Partnership Buy/Sell Agreement?			
Life Insurance (own)			
Life Insurance (TP)			
Inheritance			
<u>Real Estate</u>			
<u>Real Estate</u>			
<u>Real Estate</u>			

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<u>GIFTS in LIFE</u>			
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V. TANGIBLE PERSONAL PROPERTY

A list of your tangible personal property is helpful to your heirs and beneficiaries. As a part of your Will, you may attach a Tangible Personal Property List. You may amend this List by initialing and dating any amendments and reattaching the entire List to your Will.

<u>ITEM</u>	<u>LOCATION</u>	<u>VALUE</u>

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VI. LIABILITIES and DEBTS

Tangible Personal Property listed above has financing terms: YES/NO
IF SO, please document: _____

Real Estate Listed has Mortgage Interest (HELOC too): YES/NO
IF SO, please document: _____

Real Estate Listed has a Deed of Trust (one or more): YES/NO
IF SO, please document: _____

Real Estate Listed has Land Use or Structural Issues: YES/NO

Other Debt:

Unsecured Loans: _____ YES/NO

Credit Card Debts: _____ YES/NO

Credit Card Debts: _____ YES/NO

Credit Card Debts: _____ YES/NO

Credit Card Debts: _____ YES/NO

Judgments & Liens: _____ YES/NO

Alimony or Support _____ YES/NO

Anticipated Creditors: _____ YES/NO

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VII. DISPOSITION OF YOUR ASSETS - IN Death & IN Life (Power of Attorney)

A. BENEFICIARIES:

1. **Spouse:** YES/NO
PARTIAL INHERITANCE
DISCLAIMER
COMMUNITY PROPERTY AGREEMENT

2. **Off Spring:** YES/NO
Per Stirpes? (Down to the grands or not?)
PERCENTAGE or AMOUNT Of INHERITANCE

3. **Siblings:** YES/NO
Per Stirpes? (Down their children or to siblings)
PERCENTAGE or AMOUNT Of INHERITANCE

4. **Parents:** YES/NO

5. **Other Relatives:** YES/NO

6. **Friends:** YES/NO

7. **Charity:** YES/NO

B. ANTICIPATED NEED FOR TRUSTS? YES/NO

1. Purpose & Restrictions: _____
2. Distribution Amounts: _____
3. Distribution Timing: _____

C. ANTICIPATED HEIR (vs. Beneficiary) WILL CONTESTS: YES/NO

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D. PERSONAL PROPERTY LIST: List any persons to whom you would like to leave specific assets or specified amounts of money, and the corresponding asset or amounts.

<u>ITEM</u>	<u>BENEFICIARY</u>	<u>VALUE</u>
Example: Antique Auto	Brother Stan Fan	\$100,000.00

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E. DIGITAL PROPERTY LIST with PASSWORD AUTHORITY

Digital Asset	Contact #	User/Password Authority

F. **OTHER ASSETS:** Use this Space to identify other assets and distribution desires and concerns.

Example: Prepaid Funeral: Location & Value: _____

NOTE: IF assets must be liquidated, at any time, e.g. during life by Agent or at death for, for example, to pay for a funeral, it is best to note for the record which assets are to be the first to be offered for sale. Final Wishes should be

SCHEDULE YOUR WORKING MEETING TO DISCUSS THIS DOCUMENT.
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