

LAW OFFICES OF JAMES E. MISCAVAGE

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Attorney
James E. Miscavage

ESTATE PLANNING QUESTIONNAIRE

Name _____ Name of Spouse _____

Address _____

City _____ County _____ State _____ Zip _____

Phone (Home) _____ (Cell) _____

Email address _____

Age _____ Age of Spouse _____

Children (First Name, Middle Initial, Last Name, Ages):

1. _____

2. _____

3. _____

4. _____

Do you own real estate? Yes _____ No _____ Who is the real estate titled in? _____

Address _____

Address _____

Choice of Executor _____

Address _____

Cell Phone No. _____ Home Phone No. _____

Choice of Contingent Executor _____

Address _____

Cell Phone No. _____ Home Phone No. _____

Choice of Guardian of Children _____

Address _____

Cell Phone No. _____ Home Phone No. _____

Choice of Contingent Guardian of Children _____

Address _____

Cell Phone No. _____ Home Phone No. _____

Choice of Trustee of Children's Assets _____

Address _____

Cell Phone No. _____ Home Phone No. _____

Choice of Contingent Trustee of Children's Assets _____

Address _____

Cell Phone No. _____ Home Phone No. _____

Is your total estate including insurance, real estate and all personal property valued at more than \$5,000,000.00? Yes _____ No _____

Do you own an I.R.A.? Yes _____ No _____

Did you designate a beneficiary on the I.R.A.? Yes _____ No _____

If yes, who are your beneficiaries? _____

Do you own a safe deposit box to store your Will? Yes _____ No _____

Do you wish the attorney to hold the original documents in his safe deposit box?

Yes _____ No _____

Do you wish to be cremated? Yes _____ No _____

Do you wish to disinherit a child, spouse or relative? Yes _____ No _____

If yes, who and why?

Who would you want to be your agent on your power of attorney?

Agent _____

Cell Phone No. _____ Home Phone No. _____

Contingent Agent _____

Cell Phone No. _____ Home Phone No. _____

What gifting powers do you want to give to your agent?

How did you find the attorney?

_____ Referred by _____

_____ Verizon Yellow Pages

_____ Yellow Book

_____ Local Phone Book

_____ Live in neighborhood/saw sign

_____ Internet