

**CLETUS DAVIS, P.C.
ATTORNEY - MEDIATOR**

*Board Certified Commercial Real Estate
Texas Board of Legal Specialization*

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ESTATE PLANNING QUESTIONNAIRE

Thank you for your interest in my Firm's estate planning services. I have found that the estate planning process is facilitated for both the client and the attorney if the client reviews this questionnaire and supplies the pertinent information to the attorney. In addition to being better prepared for the initial attorney-client conference, it may be possible in some cases to prepare rough drafts of wills prior to such meeting to further expedite the process.

I. PERSONAL INFORMATION

A. Husband:

- (1) Full Name
- (2) Social Security No.
- (3) Birth Date
- (4) Occupation
- (5) Business Address and Phone No.

B. Wife:

- (1) Full Name
- (2) Social Security No.
- (3) Birth Date
- (4) Occupation
- (5) Business Address and Phone No.

C. Home Address and Phone No.

D. Date and Place of Marriage

E. Prior Marriage, if any:

- (1) How terminated
- (2) When terminated
- (3) Where terminated
- (4) Financial responsibilities (such as alimony and child support)

(If there are continuing financial responsibilities, furnish copies of pertinent documents, described herein, or advise attorney orally at the meeting.)

F. States Resided in Other Than Texas: (indicate Dates of Residence)

G. Family Members: Children, grandchildren, parents, siblings, and any others who might share in your estate. Indicate if children are from prior marriage.

<u>Full Name</u>	<u>Birth Date or Approximate Age</u>	<u>Relation</u>
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H. Other Personal Information you feel should be mentioned (health problems, etc.)

II. FINANCIAL INFORMATION

If you have a recent personal financial statement, please attach a copy. If not, please summarize your financial position as set forth below. (Note that this information will be kept strictly confidential.)

A. Real Estate:

Set forth briefly (i) type (home, ranch, investment tract, etc.), (ii) location (city or county, and state), (iii) approximate present day value, (iv) amount of outstanding mortgage, if any, on property, (v) whether owned as community property or as separate property of either husband or wife, (vi) approximate date of purchase.

(1) Home

(2) Other

B. Stocks and Bonds:

Stocks and bonds may be grouped together into categories shown below, showing approximate value for each such category. Where necessary, show what amounts are community property and which are separate property of either husband or wife.

(1) Listed Securities

(2) Government Bonds

- (3) Closely Held Business

C. Notes and Cash:

Savings and checking accounts may be grouped together, showing the total average amount that might be expected to be on deposit in the accounts from time to time. Any significant accounts which are not community property should be separately listed and identified as the separate property of either the husband or the wife.

- (1) Savings and Checking Accounts
- (2) Joint Bank Accounts with individual other than spouse
- (3) Notes Receivable
- (4) Certificates of Deposit
- (5)

Mutual Fund Shares

D. Life Insurance:

Please indicate the approximate value of life insurance carried on the life of the husband and on the life of the wife, and any loans outstanding against such policies. If further planning with respect to insurance is required, additional data can be gathered later.

- (1) Husband's life

(2) Wife's life

E. Personal Effects:

Place an approximate value (sale, not replacement) or range of values upon household goods, jewelry, silver, automobiles, and other personal effects as a group or taken all together. However, it would be helpful to list separately (either by category or individually) jewelry, works of art, antiques, collections (coins, stamps, guns, etc.) or other items that have value which significantly affect the total value of your estate, or that you might wish to leave to someone by specific mention in your will. You should also note items of significant value which are the separate property of either the husband or the wife.

F. Annuities, Retirement and Death Benefits, Stock Options, Other Employee Benefits:

Please provide the full name and address of the retirement plan, the name and address of the plan administrator, an approximate value and a general description of benefits or expected benefits from qualified pension plans, profit-sharing plans, group term life insurance, incentive stock options, etc.

G. Inherited Wealth or Expectancies:

Do not list items already owned outright and that are included among assets listed above. Provide approximate or representative values.

(1) Interest in presently existing estate or trust

(2) Expected inheritance

H. Approximate Annual Income (of each spouse):

(1) Salary, Fees, Commissions

(2) Interest

(3) Dividends

(4) Pension and Annuity

(5) Royalty

(6) Trust Income

I. Debts and Liens: (other than those listed in Paragraph A for Real Estate)

(1) Debts Owed or Liens Outstanding

(2) Debts potentially owed as a co-signer or guarantor on loans to third parties

J. Financial Advisors, if any:

- (1) Principal Bank
- (2) Trust Officer
- (3) Accountant
- (4) Insurance Advisor

K. Safe Deposit Box:

Location:
Persons with Access

III. GIFTS MADE DURING LIFE

A. Where would you want your property to go, without regard to the impact of any estate and inheritance taxes, if:

- (1) You die leaving spouse and descendants
- (2) You and your spouse die leaving descendants
- (3) _____
You, your spouse, and your descendants die in a common disaster

B. Whom would you want as executor (administer estate, distribute assets, transfer title, etc.)?

- 1. _____
- 2. _____

C. Whom would you want as trustee, if any (administer trust, invest and manage assets, make distributions, etc.)?

1. _____ 2.

D. If you and your spouse die leaving minor children, who would you want to be their guardian?

1. _____ 2.

V. OTHER DOCUMENTS

Are you interested in discussing any of the following documents:

- A. Powers of Attorney
- B. Power of Attorney for Health Care
- C. Life Insurance Trust
- D. Directives to Physicians (Living Wills)

VI. DOCUMENTS THAT ATTORNEY USUALLY NEEDS TO SEE

- A. Existing Wills
- B. Existing Powers of Attorney
- C. Existing Trust Instruments
- D. Prenuptial or Postnuptial Agreements, if applicable
- E. Divorce Decree if continuing obligations exist as discussed on page 4.

Please call Cletus “Cowboy” Davis if you have any questions regarding this questionnaire 979-779-7200. The completed questionnaire should be returned to:

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