

Date Information Received: _____

THE CORLEY LAW FIRM, P.C.

Phone 314-590-0001

**PERSONAL INFORMATION
QUESTIONNAIRE**

The following information is needed to assist us in planning your estate. Please complete the form and bring it to our initial meeting.

I. PERSONAL AND FAMILY

Full Legal Name _____

Preferred on Documents _____

Social Security No. _____

Home Address _____

County of Residence _____

Home Telephone No. _____

E-mail Address _____

Employer Name _____

Occupation _____

Address _____

Work Telephone No. _____

Date of Birth _____

Citizenship _____

State of Health _____

Widowed _____ (Date of Marriage) _____ (Date of Death) _____

Divorced _____ (Date of Dissolution) _____

Spouse's Name _____ DOB _____ SSN _____

Children and Grandchildren

<u>Full Legal Name</u>	<u>Social Security No.</u> <u>Relationship</u>	<u>Address and Telephone numbers</u> <u>(including city, state, zip)</u>	<u>Date of Birth</u>	<u>Marital Status</u>
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- 1. _____

- 2. _____

- 3. _____

- 4. _____

- 5. _____

- 6. _____

- 7. _____

Do any of your children or grandchildren have a disability? If so, please describe

Do you have any adopted children or grandchildren? If so, please name _____

Do you have any pets? If so, please name _____

Living Parents

<u>Full Legal Name</u>	<u>Relationship</u>	<u>Address and Telephone numbers</u> <u>(including city, state, zip)</u>	<u>Age</u>	<u>Marital</u> <u>Status</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

II. ASSETS AND PROPERTY (Include Time Share/Vacation Rentals)

A. Real Estate	<u>Parcel A</u>	<u>Parcel B</u>	<u>Parcel C</u>
1. Address	_____	_____	_____
	_____	_____	_____
County	_____	_____	_____
2. Record Owner(s)	_____	_____	_____
3. Date of Acquisition	_____	_____	_____
4. How Acquired	_____	_____	_____
5. Estimated Fair Market Value	_____	_____	_____
6. Mortgage Balance	_____	_____	_____
7. Attach Copy of General Warranty or Quit Claim Deed	_____	_____	_____
8. Attach Copy of Title Ins Policy (if any)	_____	_____	_____

B. Bank Accounts and Certificates of Deposit (not IRA monies which are to be listed below)

<u>Financial Institution</u>	<u>Type of Account</u>	<u>Current Balance</u>	<u>Names on Account</u>
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C. Promissory Note(s) Payable to you (please present the original of each note):

<u>Principal Face Amount</u>	<u>Rate of Interest</u>	<u>Date of Note</u>	<u>Amount Due</u>	<u>Maker</u>	<u>How is Note Secured</u>
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D. Trusts: As to any Trust of which any family member is the creator, beneficiary or Trustee, please list the following information:

<u>Creator</u>	<u>Date Created</u>	<u>Trustee</u>	<u>Beneficiaries</u>	<u>Present Value</u>
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E. **IRAs and Retirement Plans:** If you have an interest in any 401(k), 403(b) Pension Plan, Profit Sharing Plan, Keogh plan, IRA (indicate traditional or ROTH) or other tax deferred benefit plan, please list the following information:

<u>Owner /Employer</u>	<u>Type of Plan</u>	<u>Current Value of Account</u>	<u>Primary Beneficiary</u>	<u>Secondary Beneficiary</u>
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F. **Annuities:**

<u>Owner /Employer</u>	<u>Type of Plan</u>	<u>Current Value of Account</u>	<u>Primary Beneficiary</u>	<u>Secondary Beneficiary</u>
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G. **Stock Option Plans:** Describe and indicate who is the beneficiary of each:

H. **Brokerage Accounts and Listed Securities:** Describe accounts generally - need not list individual securities. Give estimated value. Also describe how securities are registered, i.e., individually, joint, etc. If in brokerage account, please name firm, broker and telephone number of broker.

I. **Interests in closely held corporations, LLC's or partnerships:** List entity name, percentage interest, how interest is titled, estimated value and names of partners, along with contact information for the general partner/manager:

J. **Life Insurance** (including group-term, term, whole life, variable life and second-to-die insurance):

<u>Name of Company</u>	<u>Policy No.</u>	<u>Type</u>	<u>Face Amount</u>	<u>Cash Surrender Value</u>	<u>Insured</u>	<u>Owner</u>	<u>Beneficiaries</u>
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K. **Valuable Tangible Personal Property:** Please list vehicles you own (year, make, model, mileage and how titled and who drives) and particular items of personal property, which have great value; i.e., artworks, coins and stamp collections, antiques, etc. that you hold separate insurance riders on, burial plots. Please indicate how ownership is titled.

L. **Major Debts** (other than real estate mortgages):

M. Safe Deposit Box – Location: _____

Whose names are on the Box? _____

N. Gifts: Have gift tax returns previously been filed? If yes, please attach copies.

O. Property Received by Inheritances: Have you inherited any property within the last ten years?

P. Do you expect to receive an inheritance from your parents or another? If so, please estimate the amount and state from whom:

Q. If divorced, attach divorce papers.

R. Please list any other state in which you have resided:

S. Do you have long-term care insurance? If so list the insurance company and policy number and benefit terms. _____

III. PLAN OF DISTRIBUTION

A. Do you desire to leave property to any of the following: Relatives outside your immediate family? Employees and friends? (If any such person is to be provided for, please give his or her name, relationship and present address, if known, and identify the specific property or the amount of cash you wish to leave to such person.) Churches, charities, educational institutions, hospitals, and the like? (If so, please give exact legal name and present address, if known, of each such beneficiary and identify the specific property or the amounts of cash you wish to give to such beneficiary. Also, if you wish to direct that any bequest or devise is to be used for a particular purpose, describe in detail.)

B. Have you promised to remember anyone in your Will in return for services or other valid consideration?

- C. **Trustees:** List the persons or corporate trust companies you want to act as Trustee(s) or successor Trustee(s) of any Trust you may establish and the order in which you would like them to serve in case one or more of them are unable to act. A Trustee manages and invests Trust assets and makes distributions of Trust assets to the beneficiaries of the Trust in accordance with its provisions. In Missouri, a Trustee must be at least 18 years of age. A person residing out of Missouri may act as a Trustee. Please indicate the relationship of the named Trustee to you.

<u>Name & Relationship</u>	<u>Address</u>	<u>City, State, Zip</u>	<u>Telephone</u>
1.	_____		
2.	_____		
3.	_____		

- D. **Guardians:** In the event that you should die, list those persons you would like to act as the legal guardian(s) or successor guardian(s) of your minor children and the order in which you would like them to serve in case one or more of them are unable to act. A legal guardian is a person appointed by a court to have the care and custody of minors (person less than 18 years of age) and to manage the assets of the minor's estate. In Missouri, a guardian must be at least 18 years of age. Please indicate the relationship of the named guardian to you.

<u>Name & Relationship</u>	<u>Address</u>	<u>City, State, Zip</u>	<u>Telephone</u>
1.	_____		
2.	_____		
3.	_____		

- E. **Personal Representatives under Will:** List the persons or corporate trust company you want to act as Personal Representative(s) or successor Personal Representative(s) of your Estate at the time of your death. The Personal Representative collects your assets, pays debts, expenses of administration and distributes the balance to your beneficiaries. Typically you would name the same persons as Trustees. Please indicate the relationship of the named personal representative to you.

<u>Name & Relationship</u>	<u>Address</u>	<u>City, State, Zip</u>	<u>Telephone</u>
1.	_____		
2.	_____		
3.	_____		

F. **Health Care Declaration and Durable Power of Attorney:** Please list in order the person or persons you would like to make health care and related decisions for you in the event you sustain a medical or mental incapacity or incurable or irreversible condition. Please indicate the relationship of the named personal representative to you.

<u>Name & Relationship</u>	<u>Address</u>	<u>City, State, Zip</u>	<u>Telephone</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

Your thoughts about the following issues will be helpful:

Organ Donation: _____

Signing a Statement regarding Removal of Life Support: _____

Cremation vs. Burial and Funeral Arrangements/Preferences: _____

G. **Durable Power of Attorney:** Please list in order the person or persons you would like to make financial decisions for you in the event you sustain a medical or mental incapacity or incurable or irreversible condition. Please indicate the relationship of the named personal representative to you.

<u>Name & Relationship</u>	<u>Address</u>	<u>City, State, Zip</u>	<u>Telephone</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

H. **Estate Planning documents:** Please attach copies of your existing Wills, Revocable Living Trusts, Irrevocable Trusts, Family Limited Partnerships, Health Care Powers of Attorney and Durable Powers of Attorney.

I. Financial Consultant: Name _____

Firm _____

Telephone Number _____

Accountant: Name _____

Firm _____

Telephone Number _____

Insurance Agent: Name _____

Firm _____

Telephone Number _____

Liability Insurance Agent: Name _____

Firm _____

Telephone Number _____

Banker: Name _____

Firm _____

Telephone Number _____

Primary Physician: Name _____

Practice Group _____

Telephone Number _____

The information above is accurate and complete to the best of my knowledge.

_____ Date

_____ Your signature