



**ESTATE PLANNING QUESTIONNAIRE**

1. Who do you want to wind up your affairs upon your death? This person is your Executor or Personal Representative.
2. Do you own an asset(s) that should be specifically given to a particular beneficiary?
3. Do any of your intended beneficiaries have any special needs that will require a sensitive distribution arrangement?
4. Who do you want to manage and invest your assets for you or your intended beneficiaries if you are unable to do so? During your life, this person is your financial agent. Upon your death, this person is a Trustee. Your financial agent and Trustee can be the same or different persons.
5. Who do you want to make medical decisions for you if you are unable to communicate your desires? This person is your health care agent or proxy.
6. Do you want all medical treatment to be discontinued if it has been determined that you are likely to die anyway?
7. If you have minor children, who do you want to raise them if you cannot? This person is the Guardian of your children. Do you want to provide any special economic arrangements to help your children's Guardians?
8. At what age or ages do you want your children (or other heirs) to get your assets? For example, your children could get  $\frac{1}{2}$  at 25 and  $\frac{1}{2}$  at 30, or  $\frac{1}{4}$  at 25,  $\frac{1}{4}$  at 30 and the rest at 35.
9. In the event you and all of your immediate family die in a common disaster, who should receive your assets?