Confidential Estate Planning Questionnaire

MORANA LAW OFFICE, LLC

Protecting Families. Planning for Life.

FOR OFFICE USE ONLY—Date: _____ Interviewer: _____

Instructions:

- Please be careful to spell all names correctly.
- If you are unsure of a question, simply leave it blank. Attach extra pages if you need more space.
- If you have prior estate planning documents, such as a Will or Trust, please bring them with you.
- If you are married, BOTH spouses must attend the first meeting. If for any reason, one spouse is unable to attend, or if you have a problem with this, please call in advance.
- Please bring a copy of the last income tax return you filed.
- PLEASE COMPLETE THE ENTIRE QUESTIONNAIRE AND BRING TO YOUR APPOINTMENT. The more you complete, the better your meeting will be!

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Part One: Personal Information

Your NameLegal AKA (if any)
Date of Birth/U.S. Citizen? □ Y □ N Are you retired? □ Y □ N If not, when?
Cell Phone () Personal E-mail
Is Your Health? ☐ Good ☐ Fair ☐ Poor (Describe any current problems:)
Have you had any major surgeries in the past 10 years? □ Y □ N Describe:
Are you (or your spouse) receiving home care or assisted living care? □ Y □ N
Were you previously married? □ Y □ N (If you had a divorce agreement, please bring it)
Occupation (or prior one, if retired):
EmployerWork Phone ()
Are you (or your spouse) a military veteran? \square Y \square N
Your Spouse's NameLegal AKA (if any)
Date of Birth/U.S. Citizen? \square Y \square N Are you retired? \square Y \square N If not, when?
Cell Phone () Personal E-mail
Is Your Health? ☐ Good ☐ Fair ☐ Poor (Describe any current problems:)
Have you had any major surgeries in the past 10 years? □ Y □ N Describe:
Were you previously married? □ Y □ N (If you had a divorce agreement, please bring it)
Occupation (or prior one, if retired):
Employer
Home Address
City State Zip
County of
Home Phone () Fax ()



Full Name	Sex (CIRCLE ONE)	DOB	Parent (CIRCLE ONE)	No. of Children	
1	M F _	//	Ours His Hers		
Address					
Home Phone ()		Cell Phone	()		
E-mail	Marital status				
Are you concerned with this child's	ability to man	age money? □	Y □ N		
Does this child have a Living Trust? \square Y \square N If so, was it prepared by us? \square Y \square N					
Full Name	Sex	DOB	Parent	No. of Children	
2	M F	//	Ours His Hers		
Address					
Home Phone ()	Cell Phone ()				
E-mail	Marital status				
Are you concerned with this child's ability to manage money? Y N					
Does this child have a Living Trust? \square Y \square N If so, was it prepared by us? \square Y \square N					
Full Name	Sex (CIRCLE ONE)	DOB	Parent (CIRCLE ONE)	No. of Children	
Full Name 3	Sex (CIRCLE ONE) M F	DOB//	(CIRCLE ONE)		
	M F _	//	(CIRCLE ONE) Ours His Hers		
3	M F _	//	(CIRCLE ONE) Ours His Hers		
3Address	M F _	//	(CIRCLE ONE) Ours His Hers		
3	M F _	//	(CIRCLE ONE) Ours His Hers () status		
3	ability to man	Cell Phone Marital age money?	(CIRCLE ONE) Ours His Hers () status Y □ N		
3Address Home Phone () E-mail Are you concerned with this child's	ability to man	//	(CIRCLE ONE) Ours His Hers () status Y □ N		
Address	ability to man □ Y □ N If so	//	(CIRCLE ONE) Ours His Hers () status Y □ N red by us? □ Y □ Parent	No. of Children	
Address	ability to man □ Y □ N If so Sex _M F _	Cell Phone Marital age money? o, was it prepar DOB	(CIRCLE ONE) Ours His Hers () status Y □ N red by us? □ Y □ Parent Ours His Hers	No. of Children	
3Address	ability to man Y N If so Sex M F	Cell Phone Marital age money? o, was it prepar DOB	(CIRCLE ONE) Ours His Hers () status Y □ N red by us? □ Y □ Parent Ours His Hers	N No. of Children	
Address	ability to man □ Y □ N If so Sex _M F _	Cell Phone Marital age money? □ o, was it prepar DOB // Cell Phone ((CIRCLE ONE) Ours His Hers () status Y □ N red by us? □ Y □ Parent Ours His Hers	N No. of Children	
Address	ability to man □ Y □ N If so Sex _M F _	Cell Phone Marital age money? O, was it prepar DOB // Cell Phone (Marital	(CIRCLE ONE) Ours His Hers () status Y □ N red by us? □ Y □ Parent Ours His Hers	N No. of Children	

Any Questions You Would Like Answered?	

 $Thank you for completing the {\it Question naire!}$