

KRITEN SPEES MARCHELLO
Estate Planning Attorney licensed in HI, NV and CA

LEGAL QUESTIONNAIRE

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1. NAME, SUCCESSOR TRUSTEES, CITIZENSHIP

| Full Names on Drivers License | | | Do You Go by Any |
|-------------------------------|--------|------|------------------|
| First | Middle | Last | Other Name |
| | | | |
| | | | |

| Name | Date of Birth (xx/xx/xxxx) | Are you a US Citizen? |
|------|-------------------------------|--------------------------|
| | | |
| | | |

WHO WOULD BE IN CHARGE AFTER YOU ARE GONE OR INCAPACITATED?

| # | Name | Relationship |
|----------|------|--------------|
| Choice 1 | | |
| Choice 2 | | |
| Choice 3 | | |

2. CHILDREN

| Child of: | Child's Name | City, State | Age | # of Children |
|---|--------------|-------------|-----|---------------|
| <input type="checkbox"/> M <input type="checkbox"/> F | | | | |
| <input type="checkbox"/> M <input type="checkbox"/> F | | | | |
| <input type="checkbox"/> M <input type="checkbox"/> F | | | | |
| <input type="checkbox"/> M <input type="checkbox"/> F | | | | |

Choice of Guardian if Minor Children

Name:

Name:

3. RESIDENCE, MAILING ADDRESS

County: Address:

City: State: Zip:

Phone: Email Address

4. BURIAL INSTRUCTIONS (CHECK ONE)

No Instructions at this time Burial Cremation
Other (specify)

5. DISTRIBUTION

WHO DO YOU WANT TO RECEIVE YOUR ASSETS WHEN YOU ARE GONE?

All to the spouse (if married) upon first death?

Other:

Equally and outright to the children (if married, upon second death)?

Other:

6. ASSETS

In this section, list your property, but if you are married list only the property which you own with your spouse.
(Do Not Include Any Account Numbers)

| A. | REAL PROPERTY & MOBILE HOMES | Value |
|----|------------------------------|-------|
| 1 | | |
| 2 | | |
| 3 | | |

| B. | MONEY OWED TO YOU: (DEEDS OF TRUST, MORTGAGES, NOTES) | Value |
|----|---|-------|
| 1 | | |
| 2 | | |
| 3 | | |

| C. | BANK, SAVING & LOAN, CREDIT UNION ACCOUNTS | Value |
|----|--|-------|
| 1 | | |
| 2 | | |
| 3 | | |

| D. | STOCKS, BONDS & INVESTMENTS | Value |
|----|-----------------------------|-------|
| 1 | | |
| 2 | | |
| 3 | | |

| E. | RETIREMENT ACCOUNTS | Value |
|----|---------------------|-------|
| 1 | | |
| 2 | | |
| 3 | | |

| F. | LIFE INSURANCE POLICIES | Value |
|----|-------------------------|-------|
| 1 | | |
| 2 | | |
| 3 | | |

| G. | ALL OTHER ASSETS | Approximate Value |
|----|--|-------------------|
| 1 | Value of all other assets, including vehicles, personal effects, household furniture and furnishings, and all other assets of every kind and nature (don't list) | |

| H. | SEPARATE PROPERTY ASSET DESCRIPTION (If you are married, list what you own separately, designating whether the man ("M") or woman ("W") owns each asset. | Value |
|----|--|-------|
| | | |
| | | |
| | | |
| | | |

WHAT IS YOUR ROUGH ESTIMATE OF YOUR TOTAL ESTATE VALUE:

7. OTHER

How did you first hear about the Kristen Spees Marchello Law Firm?

Website

Newspaper

Which one?

Referral

We would like to thank them

Other

Specify