

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

LEGAL QUESTIONNAIRE

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1. YOUR NAME, BIRTHDAY, CITIZENSHIP AND SUCCESSOR TRUSTEES

Full Name(s) as written on Drivers License			
First	Middle	Last	Date of Birth x/xx/xx

Do you go by any other names?		Are you a US Citizen?

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

#	Name (If partner listed above, start with next person)	Relationship
Choice 1		
Choice 2		
Choice 3		

2. CHILDREN

Child of the Husband or Wife :	Child's Name	City, State	Age	# of Children
H W				
H W				
H W				
H W				

Choice of Guardian if Minor Children

Name:

Name:

3. YOUR 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