



# MAZENKO LAW FIRM

Wills, Trusts, and Probate

## ESTATE PLANNING QUESTIONNAIRE

1. Husband's Full Name: \_\_\_\_\_  
US Citizen: Yes \_\_\_ or No \_\_\_; country of residence if not USA? \_\_\_\_\_  
Husband's phone number \_\_\_\_\_  
Husband's email address \_\_\_\_\_
  
2. Wife's Full Name: \_\_\_\_\_  
US Citizen: Yes \_\_\_ or No \_\_\_; country of residence if not USA? \_\_\_\_\_  
Wife's phone number \_\_\_\_\_  
Wife's email address \_\_\_\_\_
  
3. Address \_\_\_\_\_ Mailing Address \_\_\_\_\_  
\_\_\_\_\_  
County of residence? \_\_\_\_\_
  
4. Date of Current Marriage: \_\_\_\_\_
  
5. Have you been previously married? H: Yes \_\_\_ or No \_\_\_ Date of divorce: \_\_\_\_\_  
W: Yes \_\_\_ or No \_\_\_ Date of divorce: \_\_\_\_\_
  
6. **Children**  
  
Number of children? H: Alive \_\_\_\_\_; deceased \_\_\_\_\_  
W: Alive \_\_\_\_\_; deceased \_\_\_\_\_  
  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
  
Telephone No. \_\_\_\_\_  
Parents \_\_\_\_\_  
Male \_\_\_ or Female \_\_\_ Age: \_\_\_\_\_  
  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
  
Telephone No. \_\_\_\_\_

Parents

\_\_\_\_\_  
Male \_\_\_\_ or Female \_\_\_\_ Age: \_\_\_\_\_

Name

Address

Telephone No.

Parents

\_\_\_\_\_  
Male \_\_\_\_ or Female \_\_\_\_ Age: \_\_\_\_\_

7. If you have a deceased child, did he or she have any children? Yes \_\_\_ or No \_\_\_
8. Do you have a prenuptial or postnuptial agreement? Yes \_\_\_ or No \_\_\_ Date: \_\_\_\_\_
9. Do you want to limit or control how your assets are distributed to your beneficiaries? Yes \_\_\_ or No \_\_\_
10. Do you currently have a Will? Yes \_\_\_ or No \_\_\_; from what state? \_\_\_\_\_
11. Have you ever established a trust? Yes \_\_\_ or No \_\_\_ Date: \_\_\_\_\_ **Please bring a copy with you.**
12. Are you a beneficiary under any trust? Yes \_\_\_ or No \_\_\_ **Please bring a copy with you.**
13. Do you wish to disinherit anyone? Yes \_\_\_ or No \_\_\_
14. Are you interested in creating a Revocable Living Trust? Yes \_\_\_ or No \_\_\_
15. Do you have a preference whether you are buried or cremated? Wife: \_\_\_\_\_ Husband: \_\_\_\_\_
16. Are you a Florida resident? Yes \_\_\_ or No \_\_\_; Do you have a Florida driver's license? \_\_\_\_\_
17. Do you own a Florida home? Yes \_\_\_ or No \_\_\_; is it your homestead? Yes \_\_\_ or No \_\_\_
18. Do you own any other Florida real property? Yes \_\_\_ or No \_\_\_?
19. Do you own any real property located outside the state of Florida? Yes \_\_\_ or No \_\_\_: State(s) \_\_\_\_\_
20. H's IRA(s):
 

	1. _____		
	Location	Value	Beneficiaries
	2. _____		
	Location	Value	Beneficiaries

  
 W's IRA(s):
 

	1. _____		
	Location	Value	Beneficiaries
	2. _____		
	Location	Value	Beneficiaries

  
 H's 401k:
 

	_____		
	Location	Value	Beneficiaries

  
 W's 401k:
 

	_____		
	Location	Value	Beneficiaries

H's Life Insurance

Location

Value

Beneficiaries

W's Life Insurance

Location

Value

Beneficiaries

Stocks:

1. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_ Type: \_\_\_\_\_

2. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_ Type: \_\_\_\_\_

3. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_ Type: \_\_\_\_\_

Bonds:

1. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_

2. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_

3. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_

Annuities:

1. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_

2. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_

3. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_

Cash Accounts:

1. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_ Type: \_\_\_\_\_

2. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_ Type: \_\_\_\_\_

3. H \_\_\_ W \_\_\_ Joint \_\_\_

Location: \_\_\_\_\_ Value: \_\_\_\_\_ Type: \_\_\_\_\_

Other Assets: \_\_\_\_\_

Liabilities (loans/debts): \_\_\_\_\_

What is the estimated gross value of your estate? \_\_\_\_\_

We hereby certify the information provided above is accurate and complete. We acknowledge the law firm of Mazenko Law Firm and its attorneys, will rely on the above information to base their opinions.

Husband: \_\_\_\_\_

Wife: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_