QUESTIONNAIRE FOR

SPECIAL NEEDS PLANNING

This questionnaire is intended to help us provide you with the best possible legal service and advice. Please attempt to complete as much of this questionnaire as possible before your consultation. This will ensure our time together will provide you the most beneficial planning for your situation. If the question does not apply to you, please indicate “N/A.” The information you provide is held in strict confidence.

# Part I: Client Information

|  |  |
| --- | --- |
| Your Full Name:  |  |
| Address: |  |
| Home Telephone No.: |  |
| Cell Telephone No.: |  |
| Work Telephone No.: |  |
| E-mail address: |  |

**Beneficiary Information:**

|  |  |
| --- | --- |
| Full Name:  |  |
| Current Address and Phone Number: |  |
| Social Security No.: |  |
| Date of Birth: |  |
| U.S. Citizen: | □ Yes □ No |
| Marital Status: | □ Married □ Divorced □ Widowed □ Single |
| If married, spouse’s full name: |  |

**CHILDREN**

**Please list children, if any:**

|  |  |
| --- | --- |
| **Name** | **Address** |
|  |   |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Please list your grandchildren, if any:**

|  |  |
| --- | --- |
| **Name** | **Address** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Part II: Information About Beneficiary’s Assets

Please put an estimated value on each asset owned by beneficiary.

# Income

|  |
| --- |
| **Income Source****(Name of Payor)** |
|  |
|  |
|  |
|  |
|  |

# Assets

|  |  |
| --- | --- |
| Home |  |
| Vacation Home  |  |
| Other Real Estate |  |
| Other Real Estate |  |
| Checking Accounts |  |
| SavingsAccounts  |  |
| CertificatesOf Deposit |  |
| Money Market  |  |
| Mutual Funds  |  |
| Securities  |  |
| Royalties |  |
| Life Insurance (type) |  |
| Furniture  |  |
| Vehicles |  |
| Annuities  |  |
| Jewelry |  |
| Collectibles |  |
| IRAs |  |
| 401(k) orKeogh |  |
| Other  |  |
| Retirement Plans |  |
| Closely-HeldStock |  |
| Other Assets |  |
| **TOTAL**  |  |

LIABILITIES

|  |  |
| --- | --- |
| Home Mortgage |  |
| Other Mortgage |  |
| Other Mortgage |  |
| Auto Loans |  |
| Other debt |  |
| Other debt |  |
| Other debt |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **TOTAL**  |  |
| **NET WORTH**  |  |

|  |  |
| --- | --- |
| Please list all real property owned by beneficiary, if there are any other owners and how ownership in that property is held: (We may ask you to provide a copy of the deeds for any real estate currently owned by the beneficiary.) |  |
| Are any of the beneficiary’s debts insured? If yes, which ones? |  |
| Has the beneficiary ever filed a federal gift tax return?If yes, what was the total amount of gift tax paid:*(We may ask you to provide a copy of each such return.)* |  |
| Has the beneficiary ever established any trusts?If yes, please explain:What is the current value of the assets placed in each trust?*(We may ask you to provide a copy of the trust documents.)* |  |
| Is the beneficiary the current or prospective beneficiary or trustee under a trust instrument established by any other person?If yes, please explain: |  |
| Is the beneficiary the owner of any oil and gas exploration interests?If yes, please describe them:*(We may ask you to provide a copy of any available documentation, such as mineral deeds or* division order.)  |  |
| *Is the beneficiary involved in a closely held business?**If yes, what is its name and address?* *How is it organized (i.e., proprietorship, partnership, corporation, etc.)?* *Name all the owners of the business and ownership percentage:* |  |
| Does the beneficiary have an accountant?If yes, please list name, address and phone: |  |
| Does the beneficiary have an investment advisor or financial planner?If yes, please list name, address and phone number: |  |
| Other information that you believe I should know: |  |

Name(s) of person(s) completing the questionnaire:

Tell us how you heard about our firm:

Date

Thank you for taking the time to complete this questionnaire. Please send it to deanlawfirm@juliadeanlaw.com or bring it with you to our conference.

Julia Kurtz Dean

The Dean Law Firm, PLLC

The Offices of Greatwood

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