

LESLIE A. ERWIN, P.C.

ATTORNEY AT LAW

ESTATE PLANNING QUESTIONNAIRE

Your full name: _____

Spouse full name: _____

Children's Full name and age, natural or adopted: _____

Executor: _____ Successor Executor: _____

Guardian: _____ Successor Guardian: _____

(In the event you have minor children.)

Do you own a small business(es)? _____ Do you own real property in multiple states? _____

Do you want to be _____ buried or _____ cremated?

Do you have a prepaid plan? If so, what are the details? _____

General List of Assets: ___ Real Property ___ Vehicle ___ Bank Account ___ Investments
(Check all that apply.) ___ Jewelry ___ Antiques ___ Other *(List below.)*

Do you have an existing estate plan that needs to be updated? _____ If so, please specify the documents you currently have in place and the date those documents were signed: ___-___-___

___ Last Will and Testament ___ Healthcare Directive ___ Power of Attorney ___ Trust

Other: _____

Health Care Agent Name: _____ Telephone: _____

Address: _____

Health Care Agent Email: _____

Back Up Health Care Agent Name: _____ Telephone: _____

Address: _____

Health Care Agent Email: _____

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lerwin@lerwinlaw.com

Pay Online please go to <https://securepayment.link/leslieerwinlaw/>

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Financial Power of Attorney Agent Name: _____ Telephone: _____

Address: _____

Email: _____

Successor Financial Agent Name: _____ Telephone: _____

Address: _____

Email: _____

If you are including a Trust in your estate plan, then we need the following as well:

Trustee: _____ Successor Trustee: _____

CPA: _____ *Initial*

Name: _____ Phone Number: _____

Address: _____ Email: _____

INSURANCE: _____ *Initial*

Name: _____ Phone Number: _____

Address: _____ Email: _____

Do you have an umbrella policy? _____ Yes _____ No

FINANCIAL PLANNER: _____ *Initial*

Name: _____ Phone Number: _____

Address: _____ Email: _____

Please initial by each of the professionals listed above that you give Leslie A. Erwin, P.C. permission to speak with regarding your estate plan.

Please sign and date: _____

LESLIE A. ERWIN, P.C.

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List of Specific Bequests:

RECIPIENT	ITEM DESCRIPTION