LOREN E. PLEMMONS, ATTORNEY AT LAW
294 Village Square Drive, Loudon, Tennessee 37774
Phone (865) 408-0452; Fax (865) 408-0459
Email: loren.plemmons@tellicotitle.com; kmillsaps@tellicotitle.com

Date: ____________________

ESTATE PLANNING QUESTIONNAIRE

	Client 1	Client 2
Legal Name:		
Home Address:		
Home Phone:		
Cell Phone:		
Email:		
US Citizen	Yes _______ No _______	Yes _______ No _______
Marriage Date Prenuptial Agreement	Date _______________________	Yes _______ No _______

Children/Blended Family:

Legal Name	Address	Telephone #	Have Children?
			# ____________
			# ____________
			# ____________
			# ____________
			# ____________
			# ____________
			# ____________

<u>Appointment of Financial Agents</u>:

Power of Attorney - If you were living but incapacitated, no longer able to manage your financial affairs, who would be your first choice to manage your monthly income, pay your bills, pay your income taxes, and speak with your retirement company? If your first choice was unavailable or predeceased you, who would be your 2nd choice, 3rd?

	Client 1	Client 2
1st Choice Financial Agent		
2nd Choice Financial Agent		
3rd Choice Financial Agent		
Additional Financial Agents (if desired)		

Executor or Successor Trustee - Upon death, who do you choose to wind up your affairs? If your choices are different that your Powers of Attorney, please list.

	Client 1	Client 2
1st Choice Executor/Trustee		
2nd Choice Executor/Trustee		
3rd Choice Executor/Trustee		
Additional Executor/Trustee (if desired)		

**We will fully discuss any questions you have regarding the various duties of your Financial Agent.

Appointment of Health Care Agents: If you were incapacitated, either temporarily or permanently, who would be your first choice to manage your health care? If your first choice was unavailable or predeceased you, who would be your 2nd choice, 3rd? Please list contact information for your health care agents.

	Client 1	Client 2
1st Choice Health Care Agent Name, address, telephone Relationship to you		
2nd Choice Health Care Agent Name, address, telephone Relationship to you		
3rd Choice Health Care Agent Name, address, telephone Relationship to you		
Additional Health Care Agents (if desired)		

If you have questions you want to be sure to address with Loren or have additional information you would like for her to have, please use the following space. Please use additional pages if desired.

NOTES:

____

____

____

____

____

____

____

ASSET SUMMARY

If you would like to discuss which assets would go through probate court or should be included in your revocable trust, please identify each asset and who owns the asset. **Account #s are not needed**. Your estate planning discussion with Loren should address the ownership of assets and how each asset is managed in the event of your incapacity and demise.

Assets	Owner-Client 1	Owner-Client 2	Owner-Clients 1&2
Residential Real Estate List address of each property			
Other Real Estate List address of each property			
Cash, Checking & Savings Accounts ID Bank & type of accounts			
Cash, Checking & Savings Accounts ID Bank & type of accounts			
Cash, Checking & Savings Accounts ID Bank & type of accounts			
Non-Retirement Investment Accounts ID Brokerage Co.			
Non-Retirement Investment Accounts ID Brokerage Co.			
Non-Retirement Investment Accounts ID Brokerage Co.			
Non-Retirement Investment Accounts ID Brokerage Co.			
Stocks and Bonds owned outside of a brokerage account.			
Stocks and Bonds owned outside of a brokerage account.			
Non-Retirement Annuity			
Non-Retirement Annuity			
Life Insurance ID Whole or Term			

Retirement Accounts			
IRA, 401(k), 403(b) ID Brokerage Co.			
IRA, 401(k), 403(b) ID Brokerage Co.			
IRA, 401(k), 403(b) ID Brokerage Co.			
IRA, 401(k), 403(b) ID Brokerage Co.			
Retirement Annuity ID Company			
Retirement Annuity ID Company			
Miscellaneous Assets			
Vehicles Cars, Trucks, Boats, etc.			
Vehicles Cars, Trucks, Boats, etc.			
Vehicles Cars, Trucks, Boats, etc.			
Other - please identify such assets as collectibles, antiques, jewelry, weapons			
Business Interests			