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CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE

No copying or transmission without the Attorney or the Client's authorization. All information in this questionnaire is protected by the attorney-client privilege and other state and/or federal law.

No information in this questionnaire will be released to any third party without Client's prior permission.

Please complete the following questions as specifically and honestly as possible to ensure the best estate plan for your unique needs. The Attorney needs to know about particular family dynamics or potential inheritance issues (e.g. a child with special needs, a child who is not good with money, or a child in a high risk profession). Financial figures can be approximate, but need to be accurate for the Attorney to determine whether estate or gift tax issues may exist.

The U.S. estate tax law applies in 2023 at a maximum rate of 40% for estates over \$12.92 million/spouse (\$25.84 million/married couple). For 2023, tax free gifts can be made, up to \$17,000/recipient/year. There is no state estate or gift tax.

If you have questions or need more questionnaires, please email steve@johnsonlawkc.com or call (913) 707-9220. Thank you very much for the opportunity to serve your estate planning needs.



GENERAL INFORMATION

Your name: _____ Date of birth: _____

Address: _____ City: _____ State: _____
Zip: _____

Home phone: _____ Work phone: _____ Cell phone: _____
Your email: _____

Best way to contact you: Mail/Email/Home phone/Work phone/Cell phone
Special instructions re days, times, if OK to leave voicemail: _____

Have you been married before: Yes/No
If yes, married ended by: _____

Childrens' names	Adult/Age	City/State	Phone
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Grandchildrens' names	Adult/Age	City/State	Parent
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

(Please attach extra sheets as needed for additional children or grandchildren. If children or grandchildren are from a different marriage or relationship, or a family situation that would impact your estate plan, please indicate/explain that.)

WILL INFORMATION

Have you executed a will or codicil (will revision) before? Yes/No
If yes, when? _____

If you have executed a will or codicil before, please bring those documents to your appointment.

An Executor will handle your estate, pay your remaining bills, and distribute property to your heirs. Many people name a trusted family member or friend, or their bank as executor.

Your will:
Executor _____ City _____ State _____
Relationship to you _____ Phone _____

Alternate 1 _____ City _____ State _____
Relationship to you _____ Phone _____

Alternate 2 _____ City _____ State _____
Relationship to you _____ Phone _____

If you died leaving minor children, who would you want to care for your children (guardian) and their assets (conservator)?

Guardian _____ City _____ State _____
Relationship to your children _____ Phone _____

Alternate Guardian 1 _____ City _____ State _____
Relationship to your children _____ Phone _____

Alternate Guardian 2 _____ City _____ State _____
Relationship to your children _____ Phone _____

Conservator _____ City _____ State _____
Relationship to your children _____ Phone _____

Alternate Conservator 1 _____ City _____ State _____
Relationship to your children _____ Phone _____

Alternate Conservator 2 _____ City _____ State _____
Relationship to your children _____ Phone _____

PROPERTY DISTRIBUTION

(Please attach extra sheets as needed)

Who would you like to receive your personal property? You can designate different keepsakes or heirlooms for various family members or friends and change your list without an attorney. This list is usually separate from your will and should be written, signed, and dated. The list should be kept with your will and a copy given to your attorney to help your executor.

How would you like your estate distributed? Equal shares to each heir? Favor one person over another? Any special family considerations? Should surviving children take their parent's share?

Do any of your children or grandchildren have special education or medical needs? If so, we can establish special needs trusts and/or ensure that their inheritance does not interfere with their care under various governmental programs.

Need

Person

_____	_____
_____	_____
_____	_____

Is there any real estate, business interest, or other property that you would like to keep in the family?

Would you like to make any cash or property gifts to a friend, your place of worship, your college, or a charity?

To _____ Address _____
 Property to be given _____ Value _____

To _____ Address _____
 Property to be given _____ Value _____

To _____ Address _____
 Property to be given _____ Value _____

Property in your estate

Real property (house, real estate, farm land, vacation home, time share, etc.)

Description/Address	Ownership (joint, individual)	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Additional information re property managers, rental companies, crop harvests, special arrangements with caretakers or other individuals?

Personal property (special collections, stamps, electronics, books, keepsakes, family heirlooms, art collections, furniture, etc.)

Description	Ownership (joint, individual)	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

LIFE INSURANCE

(1) Company _____ Insured _____ Owner

Beneficiary _____ Death benefits _____ Cash
value _____

(2) Company _____ Insured _____ Owner

Beneficiary _____ Death benefits _____ Cash
value _____

(3) Company _____ Insured _____ Owner

Beneficiary _____ Death benefits _____ Cash
value _____

RETIREMENT PLANS, PENSIONS, IRAs, 401(k)s, etc.

(1) Company _____ Type (IRA, Roth, etc) _____ Owner

Beneficiary _____ Death benefits _____ Cash
value _____

Inherited? Yes/No RMD started? Yes/No

(2) Company _____ Type (IRA, Roth, etc) _____ Owner

Beneficiary _____ Death benefits _____ Cash
value _____

Inherited? Yes/No RMD started? Yes/No

(3) Company _____ Type (IRA, Roth, etc) _____ Owner

Beneficiary _____ Death benefits _____ Cash
value _____

Inherited? Yes/No RMD started? Yes/No

(4) Company _____ Type (IRA, Roth, etc) _____ Owner

Beneficiary _____ Death benefits _____ Cash
value _____

Inherited? Yes/No RMD started? Yes/No

BANK ACCOUNTS (checking, savings, money market funds, CDs, HSAs, etc)

(1) Company _____ Type _____ Owner _____

Cash value _____ POD? Yes/No To Whom?

(2) Company _____ Type _____ Owner _____
Cash value _____ POD? Yes/No To Whom?

(3) Company _____ Type _____ Owner _____
Cash value _____ POD? Yes/No To Whom?

(4) Company _____ Type _____ Owner _____
Cash value _____ POD? Yes/No To Whom?

SECURITIES (brokerage accounts, stocks, bonds, mutual funds, other investments)

(1) Company _____ Type _____ Owner _____
Cash value _____ POD? Yes/No To Whom?

(2) Company _____ Type _____ Owner _____
Cash value _____ POD? Yes/No To Whom?

(3) Company _____ Type _____ Owner _____
Cash value _____ POD? Yes/No To Whom?

(4) Company _____ Type _____ Owner _____
Cash value _____ POD? Yes/No To Whom?

VEHICLES (cars, trucks, motorcycles, boats, RVs, helicopters, aircraft, ATVs)

(1) Make/model/year _____ Type _____ Owner _____
Value _____ Location (if not home) _____

(2) Make/model/year _____ Type _____ Owner _____
Value _____ Location (if not home) _____

(3) Make/model/year _____ Type _____ Owner _____
Value _____ Location (if not home) _____

Private businesses (private companies, family businesses, small businesses, etc.)

Name/location	% held/ # shares	Entity types	Value of holdings
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

OTHER INCOME

Do you receive income or principal distributions from a trust? Yes/No
If yes, please explain

Do you anticipate receiving an inheritance? Yes/No
If yes, please explain from whom, when, and what amount

Do you receive royalties from patents, copyrights, trademarks, or other intellectual property? Yes/No
If yes, please explain

TAXES:

Have you given (or plan to give) gifts in excess of \$17,000 in 2023? Yes/No
If yes, please state to whom, the amount, and whether you filed a gift tax return (if so, please provide Attorney with a copy)

Did you give gifts to children or friends in excess of \$16,000 in 2022? Yes/No
If yes, please state to whom, the amount, and whether you filed a gift tax return (if so, please provide Attorney with a copy)

TRUSTS:

Have you executed a living trust before? Yes/No
If yes, when? _____

If you have executed a living trust before, please bring those documents to your appointment

A trustee manages your trust's assets for the beneficiaries. Many people name a trusted family member or friend, or their bank as a trustee or co-trustee.

Your trust:

Trustee _____ City _____ State _____
Relationship to you _____ Phone _____

Successor 1 _____ City _____ State _____
Relationship to you _____ Phone _____

Successor 2 _____ City _____ State _____
Relationship to you _____ Phone _____

Thank you for taking the time to complete this form. It will help our law firm to prepare your estate planning documents. Please bring this completed form and related documents to your appointment or mail them to the firm. We look forward to working with you.