

**CONFIDENTIAL CLIENT QUESTIONNAIRE  
FOR WILLS, TRUSTS, POWERS OF ATTORNEY, LIVING WILLS, ETC.**

Copyright 2019 by James W. Martin, Esq.

Attorney at Law

St. Petersburg, Florida

[jim@jamesmartinpa.com](mailto:jim@jamesmartinpa.com)

[www.jamesmartinpa.com](http://www.jamesmartinpa.com)

(727) 821-0904

---

Date:

Referred by:

**CLIENT INFORMATION:**

<u>Driver License Name</u>	<u>Address</u>	<u>Phones</u>	<u>Email</u>	<u>Age</u>
----------------------------	----------------	---------------	--------------	------------

Occupation:

Resided in Florida since:

Date of last will or trust:

Safe deposit box location:

Citizenship:

Accountant:

Life Insurance Agent:

Investment Broker:

**FAMILY INFORMATION:**

Driver License Name                      Address                      Phones                      Email                      Age

Spouse:

Children:

Parents:

Brothers & Sisters:

Other:

**REPRESENTATIVE INFORMATION:**

Who do you want to act for you in case of your death (PR personal representative) or incapacity (guardian or agent) and please list alternates?

Personal Representative, Guardian, Agent and Surrogate:

First Alternate:

Second Alternate:

Third Alternate:

**ASSET INFORMATION:**

(Estimated values)

Life insurance:

Home:

Other real estate:

Bank accounts:

IRA & retirement accounts:

Other accounts:

Contents & vehicles:

Inheritances expected:

Other assets:

---

Totals:

**DISPOSITIVE INFORMATION:**

(Please list to whom you want to leave your assets at your death. Please list alternates to receive each gift in case the person you name dies before you.)

Special gifts of jewelry, furnishings, autos, collections and other tangible property  
(Please state whether the cost of delivery should be paid by the estate or by the beneficiary):

Gift of all remaining tangible property:

Gift of homestead:

Special gifts of cash, stock or other specific items:

Gift of all remaining assets (residuary):

**TRUSTS FOR MINORS OR OTHERS:**

List anyone (such as minor children) for whom you want assets held in trust instead of being distributed to them at your death, so that the trustee invests and distributes the assets on a certain schedule until the beneficiaries can do so alone:

Who do you want to be the trustee (may be bank or individual)(please list alternates):

List at what age you want the beneficiary to begin directly receiving income from the trust (e.g, age 21):

List at what age(s) you want the beneficiary to receive the principal (e.g., in thirds at ages 25, 30 and 35):

**ESTATE PLANNING DOCUMENTS THAT YOU WANT TO DISCUSS:**

1. Last will and testament?
2. Revocable living trust?
3. Durable power of attorney?
4. Living will?
5. Designation of health care surrogate?
6. Declaration of preneed guardian?
7. Surrogate and preneed guardian for minors?
8. Beneficiary designations for life insurance and retirement accounts?
9. Holding assets in joint names or "in trust for" with others?
10. Do you want to discuss anything else?