

# GOLDSMITH & GUYMON

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## NEW CLIENT QUESTIONNAIRE FOR ESTATE PLAN - Married Couple

The following information will assist the attorney in the initial interview and will save time (and, therefore, fees). Please print legibly. If you do not have sufficient room to complete an answer, please write on the back of the page (and so indicate). Answer to the best of your ability. Feel free to skip a question if you are unsure. At the time of the consultation, the attorney will help you to determine what your estate planning needs are.

### GENERAL INFORMATION:

YOUR NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

SPOUSE'S NAME: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

### CONTACT INFORMATION FOR YOU:

HOME: \_\_\_\_\_ BUSINESS: \_\_\_\_\_

CELLULAR: \_\_\_\_\_ FAX: \_\_\_\_\_

E MAIL ADDRESS: \_\_\_\_\_

### PHONE(S) FOR YOUR SPOUSE:

HOME: \_\_\_\_\_ BUSINESS: \_\_\_\_\_

CELLULAR: \_\_\_\_\_ FAX: \_\_\_\_\_

E MAIL ADDRESS: \_\_\_\_\_

YOUR SOCIAL SECURITY NO. \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

SPOUSE'S SOCIAL SECURITY NO. \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

WHO REFERRED YOU TO GOLDSMITH & GUYMON? \_\_\_\_\_

TO WHOM WERE YOU REFERRED? \_\_\_\_\_

ARE YOU A U.S. CITIZEN? Yes /No, If no, Citizen of \_\_\_\_\_

IS YOUR SPOUSE A U.S. CITIZEN? Yes /No, If no, Citizen of \_\_\_\_\_

**ESTATE PLANNING INFORMATION:**

What is the primary purpose of the consultation today? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

1. How long have you been married to one another? \_\_\_\_\_
2. Has Husband been married before? Yes / No
3. Has Wife been married before? Yes / No
4. Do you know what you want to call your Trust? If so what name:  
\_\_\_\_\_
5. Do you both want to remain in charge of your assets for so long as you are able to do so? Yes / No
6. If you and your spouse cannot serve as Trustee, who do you want to be Trustee and be in charge of the Trust: \_\_\_\_\_
7. Why have you chosen the person or company named in #6: \_\_\_\_\_  
\_\_\_\_\_
8. In general terms what types of assets do you own? )Please circle all that apply:  
  
Home, stock, bonds, other securities, interest in business, bank accounts, pensions, other real estate in Nevada, real estate in states other than Nevada, vehicles, timeshares, other
9. Does the value of these assets exceed five Million Dollars? Yes / No

10. Number of Children of Wife: \_\_\_\_\_

11. Number of Children of Husband: \_\_\_\_\_

12. Children of Wife (give full names, birth dates and present residence location):

COMPLETE NAME(S)	BIRTH DATES	PLACE OF RESIDENCE

13. Children of Husband (give full names, birth dates and present residence location):

COMPLETE NAME(S)	BIRTH DATE(S)	PLACE OF RESIDENCE

14. If the children are minors and something happens to both parents such that the parents cannot raise the children, who is your first choice to raise the children? (Name and Address): \_\_\_\_\_

15. Who is the second choice (Name and Address): \_\_\_\_\_  
\_\_\_\_\_

16. If Husband cannot make his financial decisions and your Wife is also unable to do so, who do you want to make those financial decisions for you (Name and Address):  
\_\_\_\_\_  
\_\_\_\_\_

17. Who is Husband's second choice (Name and Address): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
18. If Wife cannot make her financial decisions and your Husband is also unable to do so, who do you want to make those financial decisions for you (Name and Address):  
\_\_\_\_\_  
\_\_\_\_\_
19. Who is Wife's second choice (Name and Address): \_\_\_\_\_  
\_\_\_\_\_
20. If Husband cannot make his health care decisions and your Wife is also unable to do so, who do you want to make health care decisions for you (Name, Address and Phone Number):  
\_\_\_\_\_  
\_\_\_\_\_
21. Who is Husband's second choice (Name, Address, Phone Number) :  
\_\_\_\_\_  
\_\_\_\_\_
22. If Wife cannot make her health care decisions and your Husband is also unable to do so, who do you want to make health care decisions for you (Name, Address and Phone Number):  
\_\_\_\_\_  
\_\_\_\_\_
23. Who is Wife's second choice (Name, Address, Phone Number)  
\_\_\_\_\_  
\_\_\_\_\_
24. Name and location of Attending Physician of Husband, (i.e. Dr. John Smith, presently practicing in Las Vegas, Nevada)  
\_\_\_\_\_  
\_\_\_\_\_
25. Name and location of Attending Physician of Wife.  
\_\_\_\_\_  
\_\_\_\_\_