

KATHRYN HAMLING MULKEY

ATTORNEY AT LAW
1160-E GRIMES BRIDGE ROAD
ROSWELL, GEORGIA 30075
(770) 587-3047
FACSIMILE (770) 587-3218
CELL (404) 431-6234

Estate Planning Questionnaire

Please use the tab button to proceed through the questions.

Husband's Name: [Click here to enter text.](#)

Age: [Click here to enter text.](#) Date of Birth: [Click here to enter a date.](#)

Home Address: [Click here to enter text.](#)

City, State, Zip: [Click here to enter text.](#) County: [Click here to enter text.](#)

Business Address: [Click here to enter text.](#)

City, State, Zip: [Click here to enter text.](#)

Email address: [Click here to enter text.](#)

Home phone: [Click here to enter text.](#) Business Phone: [Click here to enter text.](#)

Cell phone: [Click here to enter text.](#) Employer: [Click here to enter text.](#)

Wife's Name: [Click here to enter text.](#) Maiden name: [Click here to enter text.](#)

Age: [Click here to enter text.](#) Date of Birth: [Click here to enter a date.](#)

Business Phone: [Click here to enter text.](#) Cell phone: [Click here to enter text.](#)

Employer: [Click here to enter text.](#)

Email address: [Click here to enter text.](#)

Bank Affiliations: [Click here to enter text.](#)

Safe Deposit Box: [Click here to enter text.](#)

6. Whom do you want to serve as Executor of your estate and/or Trustee of any trust created under the will for minors or persons suffering from a disability? Also, name at least one successor and the relationship to you of the persons named.

Husband – Executor [Click here to enter text.](#)

Successor Executor [Click here to enter text.](#)

Trustee [Click here to enter text.](#)

Successor Trustee [Click here to enter text.](#)

Wife - Executor [Click here to enter text.](#)

Successor Executor [Click here to enter text.](#)

Trustee [Click here to enter text.](#)

Successor Trustee [Click here to enter text.](#)

7. Who would you like to designate as a guardian of the person for any children under the age of 18 in case the other parent does not survive? Remember that a guardian makes personal rather than financial decisions.

Guardian: [Click here to enter text.](#)

Successor Guardian: [Click here to enter text.](#)

8. Powers of Attorney are used to authorize someone to act for you should you become incapacitated. Whom would you like to name as your Financial Power of Attorney?

[Click here to enter text.](#)

Successor? [Click here to enter text.](#)

9. Are both spouses U.S. Citizens? Choose an item. [Click here to enter text.](#)

10. Are you the beneficiary of any estate or trust assets that have not been distributed to you?

[Click here to enter text.](#)

11. Do you have any special instructions regarding your funeral, burial, etc.?

[Click here to enter text.](#)

*Please bring your current wills (if applicable) and also insurance policies, deeds, trust agreements, buy-sell agreements, or other documents or contracts regarding property to our meeting.

*It is also helpful to have the addresses and phone numbers of anyone named above as guardian, executor, trustee, etc.

Estate Evaluation

<u>Type of Asset</u>	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>
Residence			
Other Real Prop.			
Listed or Traded Securities			
Closely Held Stock			
Partnership			
Sole Proprietorship			
Cash or Savings			
Automobiles			
Other Personal Prop. (jewelry, etc.)			
Life Insur. (cash Value)			
IRA Accounts			
401(k)			
Profit Sharing Acct.			
Other			
Other			
Other			

TOTALS

[Click here to enter text.](#)[Click here to enter text.](#) [Click here to enter text.](#)

Life Insurance

Insured	Owner	Company	Face Amt.	Primary Benefic.	Contingent Benefic.	Type