

KISALA WATKINS

Law Group, PLLC

Andrew J. Kisala, Esq.
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The information requested will assist us in developing the most appropriate estate plan for you. Please provide as much information as accurately and completely as possible. Feel free to attach additional sheets if necessary. Also, if you are uncertain about an answer to a particular question, simply make a note of it, and give us your best answer. Information you provide will be kept confidential unless you authorize its release to others. However, if we are being asked to represent both spouses we must and will treat all communications by either spouse (including a desire to terminate the joint representation) as common knowledge to be shared among all of us, while maintaining strict confidentiality as to anyone else.

PERSONAL INFORMATION

Full Name:			
Home Address:			
Home Phone:			
Date of Birth:			
Employer:			
Work Address:			
Work Phone:			
Cell Phone:			
Marriage(s):	Spouse:	Date of Marriage:	Date of Divorce:
	Spouse:	Date of Marriage:	Date of Divorce:

Do you presently have a will? YES/NO

If so, please attach the most recent copy.

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SPOUSE'S INFORMATION

Spouse's Full Name:	
Date of Birth:	
Employer:	
Work Address:	
Work Phone:	

Does your spouse currently have a will? YES/NO

If so, please attach the most recent copy.

CHILDREN'S INFORMATION

Name	Date of Birth	Address	Birth Parents

GRANDCHILDREN'S INFORMATION

Name	Date of Birth	Address	Birth Parents

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ADVISORS

Advisor	Name	Address	Phone	Email
Accountant				
Financial Advisor				
Stock Broker				
Trust Officer/Banker				
Attorneys				

CLOSELY—HELD BUSINESS INTERESTS

Company: _____

Address: _____

Type of Entity: _____

Percentage of Business you own and its estimated value: _____

Percentage of Business other family members own and its value: _____

Identity of Non-family owners if any: _____

Do you desire the business to be continued after your death? _____

What provisions have been made for successor management? _____

Are there any buy/sell or stock redemption agreements? _____

What arrangements have been made to fund any such buyout or redemption? _____

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ESTATE PLANNING OBJECTIVES

Identify any debts owed to you that you wish to address in your estate plan:

DEBTOR	RELATIONSHIP	AMOUNT OF DEBT

Identify any debts that you owe that you wish to address in your estate plan:

CREDITOR	TYPE OF DEBT	AMOUNT OF DEBT

Do you want to require that any mortgage or other debt secured by your residence or any other property be paid out of your estate? Explain:

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FINANCIAL INFORMATION

ASSETS	AMOUNT	JOINT OWNER NAME	AGENCY/ACCT #
Cash and Bank Accounts			
Notes and Accounts Receivable			
Stocks, Bonds, and Mutual Funds			
Annuities			
Options			
Residence (market value)			
Other Real Estate (Market Value)			
Life Insurance (Face Value)			
IRA			
401(k)			
Qualified Pension			
Profit Sharing Plans (vested)			

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Tangible Personal Property			
Business Property			
Interests			
Other			
Subtotal			

LIABILITIES	AMOUNT	JOINT OWNER NAME	AGENCY/ACCT #
Real Estate Mortgages			
Loans on Insurance			
Other Loans & Notes			
Pledges			
Taxes			
Other			
TOTALS			

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LIFE INSURANCE INFORMATION

Company: _____
Address: _____
Type of Policy: _____
Insured: _____
Owner: _____
Primary Beneficiary: _____
Contingent Beneficiary: _____
Death Benefit: _____
Insurance Agent's name: _____

Company: _____
Address: _____
Type of Policy: _____
Insured: _____
Owner: _____
Primary Beneficiary: _____
Contingent Beneficiary: _____
Death Benefit: _____
Insurance Agent's name: _____

Company: _____
Address: _____
Type of Policy: _____
Insured: _____
Owner: _____
Primary Beneficiary: _____
Contingent Beneficiary: _____
Death Benefit: _____
Insurance Agent's name: _____

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GIFTS

Identify any charitable or non-charitable specific gifts you wish to make in your estate plan:

NAME and ADDRESS	RELATIONSHIP	ITEM/AMOUNT OF GIFT

Residuary: Describe how you would like to dispose of the remainder of your estate:

NAME and ADDRESS	RELATIONSHIP	ITEM/AMOUNT OF GIFT

Should all of your intended beneficiaries fail to survive you to take your property, please list any contingent charitable or non-charitable beneficiaries to whom you may wish to leave your property?

NAME and ADDRESS	RELATIONSHIP	PERCENTAGE

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GUARDIANS, EXECUTORS, TRUSTEES AND AGENTS

1. If you have a minor child or minor children, you may designate in your will a guardian or guardians you wish to nominate to have physical care and custody of the minor child or children if both natural parents are deceased.

Name	Relationship	Address
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Guardian: _____

Alternate: _____

2. Your executor has the responsibility to wind up your affairs after your death. An executor will ensure that your assets are collected, any claims against you, expenses, estate and inheritance taxes are paid, and then distribute the remaining estate property to trustees or other named beneficiaries. We strongly encourage you to designate one or more executors.

Name	Relationship	Address
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Guardian: _____

Alternate: _____

3. If your estate plan will include trusts, you should select one or more trustees. A trustee has the responsibility for the management of estate property that is to be held in trust for the benefit of the beneficiaries of the trust. A trustee can be an individual or a corporation qualified to act as a trustee (typically a bank or trust company).

Name	Relationship	Address
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Trustee: _____

Alternate: _____

Are you an organ donor? _____

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4. Have you made past gifts to a person or organization other than a spouse or a charity where the amount of such gift in any single year was more than \$3,000.00 in any year prior to 1982 or more than \$10,000.00 in any year since 1982? _____

If so, please state the nature and amount of the gift, when it was made, and to whom it was made:

5. Have you placed any property in joint names with any person other than your spouse? _____

If so please explain:

6. Are you a guarantor (co-signer) of any indebtedness? _____

If so please explain:

7. Do you currently possess any powers of appointment over property (the right to transfer or dispose of property that you do not own) under a will, trust or other document? _____

If so, please explain and provide a copy of the document(s) creating any such power of appointment:

8. Have you purchased any prepaid burial contracts? _____

If so, please explain in detail with the name, address, and description of these contracts:

9. Do you have long term care insurance? _____

If so, please explain:

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10. Describe or list any other facts or matters about your affairs or situation that may be relevant in planning your estate but which do not seem to be covered by the other sections of this questionnaire:

POWER OF ATTORNEY

A power of attorney is a legal document in which you authorize another person (called an agent or attorney in fact) to act on your behalf in the management of your affairs. If your estate plan is to include a Power of Attorney, you should select one or more agents.

Name	Relationship	Address
------	--------------	---------

Agent: _____

Alternate Agent: _____

HEALTH CARE POWER OF ATTORNEY

A Health Care Power of Attorney appoints a person (called a health care agent) as your representative to make decisions regarding your health care treatment when you are unable to give informed consent. If you wish to include a Health Care Power of Attorney in your estate plan, you will need to list the physician (or you can put "my attending physician") who you wish to make the determination as to when you are incapable of giving informed consent, in which event the Health Care Power of Attorney will be activated. You also will need to list the persons you want to serve as your health care agents.

Name	Relationship	Address
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Physician: _____

Agent: _____

Alternate Agent: _____

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OTHER MATTERS RELEVANT TO ESTATE PLANNING

List the current primary and contingent beneficiaries of each IRA and retirement benefits plan:

IRA or Benefits Plan	Primary/Relationship	Contingent Relationship

List the current primary and contingent beneficiaries of each annuity:

Annuity	Primary/Relationship	Contingent Relationship

Do you own any real property outside of North Carolina? _____

If so, please describe the property owned and where it is located: