

DONALD S. HENDEL, LLC
ESTATE PLANNING QUESTIONNAIRE

Personal and Family Information

Your Name: _____ Social Security No.: _____

Date of Birth: _____ Citizenship: _____

Home Address: _____

City, State, Zip: _____ Telephone: _____

Business Address: _____

City, State, Zip: _____ Telephone: _____

Email: _____ Fax: _____

Spouse: _____ Social Security No.: _____

Date of Birth: _____ Citizenship: _____

Business Address: _____

City, State, Zip: _____ Telephone: _____

Email: _____ Fax: _____

Children and Grandchildren:

| Name | Relationship | Single/Married | Date of Birth |
|-------|--------------|----------------|---------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Donald S. Hendel, LLC
Estate planning questionnaire

Assets

| | Husband | Wife | Joint |
|-----------------------|---------|------|-------|
| Cash | | | |
| Marketable Securities | | | |
| Notes and Receivables | | | |
| Business Interests | | | |
| Home | | | |
| Other Real Estate | | | |
| Insurance on Husband | | | |
| Insurance on Wife | | | |
| Retirement Plans | | | |
| Personal Property | | | |
| Other | | | |
| | | | |
| | | | |
| | | | |

Notes:

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Liabilities

| | | | |
|------------------------------|--|--|--|
| Home Mortgage | | | |
| Other Mortgages | | | |
| Other Debts | | | |
| Loans against life insurance | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Notes:

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Life insurance

| Company | Death Benefit | Cash Value | Beneficiary | Owner |
|---------|---------------|------------|-------------|-------|
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Do you have current wills? If so, please supply copies.

If you have ever filed gift tax returns, please supply a copy of the most recent return.

Are you entitled to receive the income or principal from any existing trust or estate?

Do you expect a substantial inheritance from any person?

Accountant's name, address and phone number:

Investment advisor's name, address and phone number:

Insurance agent's name, address and phone number:
