

McAndrews Law Offices, P.C.



30 Cassatt Avenue
Berwyn, Pennsylvania 19312
Phone: 610 648 9300
Fax: 610 648 0433
www.mcandrewslaw.com

ATTORNEYS AT LAW

ESTATE PLANNING QUESTIONNAIRE

Name: _____

SSN: ____ - ____ - ____

Date of Birth: ____/____/____

Home Address, E-mail Address,
and Phone No.

Business Address, E-mail Address,
and Phone No.

Occupation: _____

Spouse's Name: _____

SSN: ____ - ____ - ____

Date of Birth: ____/____/____

Business Address, E-mail Address, and Phone No.

Date and Place of Marriage: _____

Has either you or your spouse been married before? _____

Do you have current Wills, Trusts, or Powers of Attorney? ____ (If yes and copies have not been provided, please provide)

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Children and Other Dependents:

Name	Relationship	Date of Birth
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____

Are any children or dependents disabled? _____ If yes, please attach a medical/psychological report or other description.

Life Insurance:

Type	Death Benefit	Insured*	Owner*	Beneficiary
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

* H = Husband

W = Wife

O = Other

Name of Proposed Executor/Executrix

Address:

E-mail Address:

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Name of Alternate Proposed Executor/Executrix

Address:

E-mail Address:

ASSETS

Indicate approximate values in appropriate columns

Property Description	Joint	Husband	Wife
Personal and household articles (generally assumed to be joint property)			
Valuable collections, e.g. art, jewelry, antiques			
Automobiles			
Checking or savings accounts			
Money market or savings certificates			
Stocks and bonds			
Business interest			
Home (net of mortgage)			
Other real estate (with location)			
Pension or Profit-sharing			
IRAs			
Other Assets			

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Debts or Liabilities

Please list any significant debts or other financial liabilities (e.g. mortgages, loans, etc.).

Disposition of Estate

Please provide a general description of the disposition of your property which you (and your spouse, if applicable) desire upon your death(s).

How were you referred to McAndrews Law Offices, P.C.?
