

Gwynne Wiatrowski Guzzeau, LLC
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(508) 255-1411 Tel.
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ESTATE PLANNING QUESTIONNAIRE

GENERAL INFORMATION

Client

First Name: _____ Middle: _____ Last: _____

Nickname (if any): _____ Alias Name (if any): _____

Gender: Male Female DOB: _____

U.S. Citizen? Yes No If No, specify citizenship: _____

Health: Excellent Reasonably good Poor Serious Adverse Condition

Legally blind? Yes No Disabled? Yes No

Spouse/Partner (if applicable)

First Name: _____ Middle: _____ Last: _____

Nickname (if any): _____ Alias Name (if any): _____

Gender: Male Female DOB: _____

U.S. Citizen? Yes No If No, specify citizenship: _____

Health: Excellent Reasonably good Poor Serious Adverse Condition

Legally blind? Yes No Disabled? Yes No

Contact Information

Residential Address	
Mailing Address	
Home Phone	
Cell Phone	
Personal email	
Other phone	
Other contact info	

Referral Informaton

By whom were you referred to this office?

Name	Address

CHILDREN (if applicable)

	Name	Living	Gender	Date of Birth	Married	Disabled
Child 1		Y / N	M/F		Y / N	Y / N
Child 2		Y / N	M/F		Y / N	Y / N
Child 3		Y / N	M/F		Y / N	Y / N
Child 4		Y / N	M/F		Y / N	Y / N

	Address	Phone
Child 1		
Child 2		
Child 3		
Child 4		

	Married	Children	Ages and names of your grandchildren, if any
Child 1	Y / N	Y / N	
Child 2	Y / N	Y / N	
Child 3	Y / N	Y / N	
Child 4	Y / N	Y / N	

CONFIDENTIAL ASSET AND LIABILITY QUESTIONNAIRE – Part 1

FINANCIAL SUMMARY

	OWNER	ASSET	LIABILITY
Description	Joint or Client or Partner/Spouse	Estimated Value	
Cash/Liquid			
Savings			
Checking			
Money Market			
CD			
Real Estate			
Primary			
Secondary			
Personal Property			
Automobiles			
Jewelry			
Art or Other Collections			
Boat			
Intangibles			
Brokerage Account Totals			
Individual Stock (not in brokerage acct.)			
Mutual Funds (not in brokerage acct.)			
Bonds (not in brokerage acct.)			
Annuities			
Future Inheritance or Interests in Trusts			
Retirement Benefits			
IRAs			
401K			
Other			
Life Insurance: Cash Value of all policies			

