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Rob Goldman's Preliminary Estate Planning Questionnaire

Most people who wish to get their affairs in order have never sat down with an attorney to discuss their personal business and don't know what to expect. This document is designed to help you understand the process and be better prepared for your estate planning consultation.

Things We Need to Know and For You to Think About and Organize For the Consultation:

1. Do you have any minor children? (Make a list of names, addresses & telephone numbers) Yes; No
2. Do you own or are you buying your home? (Bring a copy of your deed, if you can) Yes; No
3. I am in the process of a divorce, recently divorced, in a bad marriage, none of the above (Bring a copy of Divorce Order or Separation Agreement, if you can)
4. Do you wish to decide how your property is to be distributed after your death? Yes; No
5. Is avoiding probate important to you? (*If you don't know, Mr. Goldman will explain these issues with you at your appointment*) Yes; No
6. Would you like to decide who will manage your affairs and make decisions for you when you're not able to do so for yourself? Yes; No
7. Do you have any joint accounts? (Bring copies of recent statements, passbook, etc) Yes; No
8. Do you have beneficiaries listed on your accounts? Yes; No
9. Do you have any life insurance? Yes; No
10. Do you have any pension or retirement accounts? Yes; No
11. Do you have any stocks or bonds? (Bring recent statements) Yes; No
12. Do you own or are you buying any other real estate, such as rental properties, vacation homes, time-shares, etc. Yes; No
13. Do you own or have an interest in any business? Yes; No
14. Are you entitled to benefits from insurance, personal injury, wrongful death, survivor benefits, etc? Yes; No
15. Do you have any pets or other animals that you wish to provide for in the event of your death or disability? Yes; No
16. In case you should become disabled, whether short-term or indefinitely, would

you prefer to plan ahead and appoint someone you trust to manage your affairs and make decisions for you by way of a power-of-attorney, or would you prefer to have your loved one's have to rush to a lawyer and the court to appoint a legal guardian for you if a need should arise, and have to report to the court annually?

Yes; No

17. If you appoint someone as your power-of-attorney to manage your business affairs and make decisions for you when you're not able to do so for yourself, do you want the same person to make important health-care decisions for you? Yes; No
18. Is it important to you to have more than one person serving as your power-of-attorney? *(Mr. Goldman can explain these issues at your appointment)* Yes; No
19. Is it important to you to protect your assets as much as possible against potential claims of creditors? Yes; No
20. Is it important to you to: maintain full ownership and control of all your assets until your death; or transfer some interest now if you feel comfortable with the idea?
21. Do you have an aging parent you are concerned about? Yes; No
22. Do you wish to make special provisions to leave money or assets in trust for: minor children; disabled child; elderly parent; other: _____
23. Good planning is based on good information. Does anyone you may wish to appoint, or their spouse, or any beneficiary:
 have serious marital problems; unduly influenced by someone else;
 have an alcohol or drug dependency problem; have financial problems;
 have a criminal background; have a disability, including memory or other health or other problems that may affect ability to act effectively on your behalf?
24. Are you involved in any legal action, either as plaintiff, or as defendant? Yes; No
25. Do you wish to specifically disinherit any child? Yes; No
26. Do you wish to provide a greater benefit to any child that takes care of you and helps your to live at home as long as possible? Yes; No
27. Do you own a cemetery lot? Yes; No
28. Have you made any prepaid funeral/burial arrangements? Yes; No
29. Do you think a professional review of your situation, your needs and concerns will be helpful to you in understanding the legal issues and to make an informed planning decision? Yes; No
30. List here any other issue of special concern to you:

31. Are you in financial difficulty and need to explore options to save your home? Yes; No