

Estate Planning Questionnaire

(Married Person)



McCarter & Greenley, LLC
 One Metropolitan Square
 211 North Broadway, Suite 2100
 St. Louis, Missouri 63102
 (314) 436-2100 (314) 436-2577 (F)
 www.mccartergreenley.com

(Complete to the extent that information is available to you.)

_____ Date of Interview

_____ Interviewer

	<u>Name</u>	<u>Birthdate</u>	<u>Soc. Sec. No.</u>
Husband	_____	_____	_____
Wife	_____	_____	_____
Child	_____	_____	_____
Child	_____	_____	_____
Child	_____	_____	_____
Child	_____	_____	_____
Grandchild	_____	_____	_____
Grandchild	_____	_____	_____
Grandchild	_____	_____	_____
Trusted persons	_____	_____	_____
Prospective guardian (of minor children)	_____	_____	_____
<u>Other Information</u>			
Primary residence address / when there _____			
Secondary residence address / when there _____			
Business address – Husband _____			
Business address – Wife _____			
County of primary residence _____			
County of secondary residence _____			
Home telephone(s) _____		Home fax(es) _____	
Business telephone(s) –	Husband _____	Wife _____	_____
Business fax(es) –	Husband _____	Wife _____	_____
Cell phone(s)	Husband _____	Wife _____	_____
Home e-mail address(es)	Husband _____	Wife _____	_____
Bus. e-mail address(es)	Husband _____	Wife _____	_____
Citizenship –	Husband _____	Wife _____	_____
Occupations –	Husband _____	Wife _____	_____
Accountant _____	Life Ins. Agent _____		_____
Banker _____	Stockbroker _____		_____