

## Clergy Questionnaire

Clergy title \_\_\_\_\_

Date you were ordained \_\_\_\_\_

Organization through which you were ordained \_\_\_\_\_

Date you became licensed to minister \_\_\_\_\_

Name and title of ordaining clergy \_\_\_\_\_

Current religious affiliation \_\_\_\_\_

Current duties \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Hours worked (per day/week/month?) \_\_\_\_\_

How are you financially compensated? \_\_\_\_\_

# Estate Planning Questionnaire

## Individual:

Name \_\_\_\_\_ Birth date \_\_\_\_/\_\_\_\_/\_\_\_\_ SS # \_\_\_\_-\_\_\_\_-\_\_\_\_

Home Address \_\_\_\_\_  
\_\_\_\_\_

Phone: Work: (\_\_\_\_) \_\_\_\_\_ Home: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_

E-mail: \_\_\_\_\_

U.S. Citizen? Yes \_\_\_\_\_ No \_\_\_\_\_

## Names of Children?

Name: \_\_\_\_\_  
Birth date \_\_\_\_/\_\_\_\_/\_\_\_\_  
SS # \_\_\_\_-\_\_\_\_-\_\_\_\_

Name: \_\_\_\_\_  
Birth date \_\_\_\_/\_\_\_\_/\_\_\_\_  
SS # \_\_\_\_-\_\_\_\_-\_\_\_\_

Name: \_\_\_\_\_  
Birth date \_\_\_\_/\_\_\_\_/\_\_\_\_  
SS # \_\_\_\_-\_\_\_\_-\_\_\_\_

Name: \_\_\_\_\_  
Birth date \_\_\_\_/\_\_\_\_/\_\_\_\_  
SS # \_\_\_\_-\_\_\_\_-\_\_\_\_

## Guardian for Minor Children

A common provision in a Will is the appointment of a Guardian for minor children. However, a Guardian is appropriate only for minor children under age 18, and, only if neither spouse is living.

Do you have any children: Yes \_\_\_\_\_ No \_\_\_\_\_

1<sup>st</sup> Guardian \_\_\_\_\_  
2<sup>nd</sup> Guardian \_\_\_\_\_

residing in \_\_\_\_\_  
residing in \_\_\_\_\_

## Executor

The Executor's duties include the payment of debts and expenses of your estate, filing of necessary income and estate tax returns and the distribution of the assets of your estate in accordance with the terms of your will. Ultimately, the Executor distributes the residue to (i) a revocable trust if created during lifetime, (ii) a testamentary trust created under the Will, or, (iii) to the beneficiaries receiving the distribution. The Executor's job is for a limited period of time.

Executor \_\_\_\_\_  
1<sup>st</sup> Successor \_\_\_\_\_  
2<sup>nd</sup> Successor \_\_\_\_\_

residing in \_\_\_\_\_  
residing in \_\_\_\_\_  
residing in \_\_\_\_\_

## Trustee

The Trustee is responsible for distributing the Trust assets in accordance with either a Revocable Trust Agreement created during your lifetime, or, pursuant to the terms of a testamentary trust. It is a good idea to consider a number of Successor Trustees as well as a financial institution.

Initial Trustee \_\_\_\_\_  
1<sup>st</sup> Successor \_\_\_\_\_  
2<sup>nd</sup> Successor \_\_\_\_\_  
Financial Institution \_\_\_\_\_ of \_\_\_\_\_

residing in \_\_\_\_\_  
residing in \_\_\_\_\_  
residing in \_\_\_\_\_  
\_\_\_\_\_

## Health Care Power of Attorney

The Health Care POA allows your appointed Agent to make health care decisions for you if you become disabled. These decisions include those that you could make on your own if you were able.

1<sup>st</sup> Agent \_\_\_\_\_  
2<sup>nd</sup> Agent \_\_\_\_\_  
3<sup>rd</sup> Agent \_\_\_\_\_

residing in \_\_\_\_\_  
residing in \_\_\_\_\_  
residing in \_\_\_\_\_

