

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

Husband and Wife:

Husband's Name _____ Birth date ____/____/____ SS # ____-____-____

Wife's Name: _____ Birth date ____/____/____ SS # ____-____-____

Home Address _____

Phone: Work: (____) _____ Home: (____) _____ Fax: (____) _____

E-mail: _____

U.S. Citizen? Yes _____ No _____ Are both husband and wife U.S. Citizens? 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.

1st Guardian _____

residing in _____

2nd Guardian _____

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 _____

residing in _____

1st Successor _____

residing in _____

2nd Successor _____

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 _____

residing in _____

1st Successor _____

residing in _____

2nd Successor _____

residing in _____

Financial Institution _____ of _____

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.

1st Agent _____

residing in _____

2nd Agent _____

residing in _____

3rd Agent _____

residing in _____

