

Estate Planning Questionnaire

Do you need to update your estate plan?

Answering these questions will help you decide whether you should schedule a consultation with us.

Financial Status	Yes	No
1. Has your net worth changed significantly since you established or last modified your estate plan?	<input type="checkbox"/>	<input type="checkbox"/>
2. Has the overall nature of your assets (e.g., stocks, IRAs, real property, partnerships, life insurance) changed since you established or last modified your estate plan?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have substantial tax-deferred assets?	<input type="checkbox"/>	<input type="checkbox"/>
Change in Family Composition or Beneficiaries		
4. Has your marital status changed?	<input type="checkbox"/>	<input type="checkbox"/>
5. Have you registered, or might you benefit from registering, as a Domestic Partnership?	<input type="checkbox"/>	<input type="checkbox"/>
6. Are you concerned about leaving an inheritance outright to a beneficiary, and/or would you like to restrict a beneficiary's access to his/her inheritance?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you have new beneficiaries, or want to make any additions, omissions or changes to any bequests or beneficiaries?	<input type="checkbox"/>	<input type="checkbox"/>
8. Are any of your beneficiaries disabled or receiving public assistance, such as SSI or Medi-Cal?	<input type="checkbox"/>	<input type="checkbox"/>
Change in Decision Makers		
9. Have there been any significant changes in the lives of your appointed decision makers that would affect their ability to serve on your behalf?	<input type="checkbox"/>	<input type="checkbox"/>
10. Are there people you would like to have as decision makers who are not listed on your original estate plan documents?	<input type="checkbox"/>	<input type="checkbox"/>
Other Considerations		
11. If you have a living trust, do you need assistance in reviewing whether you have properly transferred title to your assets to the living trust?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you want to make gifts while you are alive to your children, grandchildren, relatives or friends for their education or other endeavors, or for your own tax considerations?	<input type="checkbox"/>	<input type="checkbox"/>
13. Are you interested in making charitable gifts during your life or at death?	<input type="checkbox"/>	<input type="checkbox"/>
14. Are you counting on Medi-Cal to cover the cost of nursing home care?	<input type="checkbox"/>	<input type="checkbox"/>
15. Do you have a Bypass, Residual or Exemption Trust?	<input type="checkbox"/>	<input type="checkbox"/>

If you answered yes to one or more of these questions, we encourage you to call our office at (415) 925-5200 to schedule a consultation.