



GEN FINANCIAL MANAGEMENT, INC.

Estate Planning Questionnaire

Client Name:	Phone:
Email:	Date of Birth:
Address:	

Additional Client Name:	Phone:
Email:	Date of Birth:
Address:	

Describe special needs of family members (if any)

Do you have a safe or safe deposit box? yes no
If yes, where is it located?

Do you have existing estate planning documents (i.e. wills, trusts, power of attorney or health care directives)?
If yes, please provide copies. Client: yes no Spouse: yes no

Do you anticipate an inheritance?:	Estimated amount	When anticipated
Recipient:	\$	

At your death, would you like assets to be distributed outright to your child(ren)? yes no
Or

Would you like assets to be held in trust for your child(ren)? yes no

If assets are held in trust for your child(ren), at what age(s) would you like the trust assets distributed?

_____ % of the trust assets at age _____;

_____ % of the trust assets at age _____;

_____ % of the trust assets at age _____;

_____ % of the trust assets at age _____;

I would prefer the trust assets to be distributed as follows: _____

If no one in your immediate family is available to receive the ultimate disposition of your assets, to whom would you like them to be distributed? (i.e. nieces and nephews, siblings, charitable organizations) _____

Accountant: _____	Phone # _____
Company Name and Address:	

Financial Planner	GEN Financial Management, Inc.	Phone #	952-513-1466
Name and Address:	10810 Old County Road 15		
	Suite 200		
	Plymouth, MN 55441		

Life Insurance Agent: _____	Phone # _____
Company Name and Address:	

Other Advisor: _____	Phone # _____
Company Name and Address:	

Guardians

Who should be the guardian of your minor children? A guardian has physical and legal control over your children until they reach the age of 18.

First Choice
Name, Relationship

Second Choice
Name, Relationship

Third Choice
Name, Relationship

Personal Representative - Client

Who should be the Personal Representative (“Executor”) of your estate? A Personal Representative is responsible for probating your will, paying your debts, collecting your assets, and settling your estate.

First Choice
Name, Relationship

Second Choice
Name, Relationship

Third Choice
Name, Relationship

Trustee – Client

If a trust is appropriate to include in your estate plan, who should be the Trustee? A Trustee is the person or entity who is responsible for managing the assets placed into the trust. A Trustee manages the assets for your children or other beneficiaries until they reach a specified age. If you do not establish a trust, children inherit at age 18. You may name an individual, bank or trust company, or both to act as your Trustee(s).

First Choice
Name, Relationship

Second Choice
Name, Relationship

Third Choice
Name, Relationship

Power of Attorney - Client

A Power of Attorney allows you to grant another person the power to act on your behalf to manage your assets and pay your bills if you become incompetent or unable to sign your name. The person (or persons) you designate is/are called “Attorney(s)-in-Fact.” Who would you name as your Attorney(s)-in-Fact?

First Choice
Name, Relationship, Address, Phone

Second Choice
Name, Relationship, Address, Phone

Third Choice
Name, Relationship, Address, Phone

Health Care Directive – Client

A Health Care Directive allows you to appoint someone to make health care decisions for you and/or state your preferences for health care in the event you are unable to communicate them. Who would you designate as your “Health Care Agent?”

First Choice Name, Relationship, Address, Phone	Second Choice Name, Relationship, Address, Phone	Third Choice Name, Relationship, Address, Phone
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Personal Representative – Spouse (if different from above)

Who should be the Personal Representative (“Executor”) of your estate? A Personal Representative is responsible for probating your will, paying your debts, collecting your assets, and settling your estate.

First Choice Name, Relationship	Second Choice Name, Relationship	Third Choice Name, Relationship
_____	_____	_____
_____	_____	_____

Trustee – Spouse (if different from above)

If a trust is appropriate to include in your estate plan, who should be the Trustee? A Trustee is the person or entity who is responsible for managing the assets placed into the trust. A Trustee manages the assets for your children or other beneficiaries until they reach a specified age. If you do not establish a trust, children inherit at age 18. You may name an individual, bank or trust company, or both to act as your Trustee(s).

First Choice Name, Relationship	Second Choice Name, Relationship	Third Choice Name, Relationship
_____	_____	_____
_____	_____	_____

Power of Attorney - Spouse (if different from above)

A Power of Attorney allows you to grant another person the power to act on your behalf to manage your assets and pay your bills if you become incompetent or unable to sign your name. The person (or persons) you designate is/are called "Attorney(s)-in-Fact." Who would you name as your Attorney(s)-in-Fact?

First Choice Name, Relationship, Address, Phone	Second Choice Name, Relationship, Address, Phone	Third Choice Name, Relationship, Address, Phone
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Health Care Directive – Spouse (If different from above)

A Health Care Directive allows you to appoint someone to make health care decisions for you and/or state your preferences for health care in the event you are unable to communicate them. Who would you designate as your "Health Care Agent?"

First Choice Name, Relationship, Address, Phone	Second Choice Name, Relationship, Address, Phone	Third Choice Name, Relationship, Address, Phone
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____