

Estate Planning Data Collection Form

Name:

CONFIDENTIAL INFORMATION

This data collection form will help you to identify and gather the information that will be needed to discuss your estate planning goals and objectives.

ESTATE PLANNING QUESTIONNAIRE

The following data is strictly confidential. This data form provides a way to consolidate your estate planning information in a relatively brief yet comprehensive form. It is designed to be both a helpful exercise for YOU as well as a source of relevant information for US to assist in providing a personalized analysis of your estate planning situation.

Personal Information:	
Name	
DOB	
Address	
Father's name	
PAN number	
Family information:	
Details of Spouse	
Name	
DOB	
Address	
Spouse's Father's name	
PAN number	
Details of child 1	
Name	
DOB	
Address	
Details of child 2	
Name	
DOB	
Address	

*"Live like you will die tomorrow,
plan like you will live for 100 years"*



ASSETS

Home and Other Real Estate:

DESCRIPTION & LOCATION	TITLE	PURCHASE PRICE	EST. CURRENT VALUE

Other Assets:

DESCRIPTION & LOCATION	TITLE	PURCHASE PRICE	EST. CURRENT VALUE

Making Decisions about Your Estate Plan

1. Who Gets What on your demise – your desires

- a)
- b)
- c)
- d)

Others if any (Specific desires)

- a)
- b)
- c)
- d)

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2. Who will be the executor of your estate :

Name:

Address:

Age:

Relationship:

Executor's Father's name:

3. Who will be guardian of minor children

If your children are minors, consider the choice of guardian in case of demise of both the parents.

(Add if you wish to have more than one)

Name:

Address:

Age:

Relationship:

Guardian's Father's name:

You should give some thought to your estate plan every year. Changes to your financial situation, changes in your intentions, changes in the age and demographic of your family members all may affect your estate plan. It is good idea to periodically revisit the plan and make certain it still meets with your wishes.

Rejoice!

Great job! It isn't easy, but it definitely shows that you care for your loved ones.

Date:

Place: