

**DAVID N. BRYAN, P.A.**  
**CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE**

Date:

**I. Family Data:**

Client Full Name:

Client Date of Birth:

Spouse Full Name:

Spouse Date of Birth:

Home Address:

Home Phone No.:

Client Business Address:

Client Business Phone, Fax and Cell No.:

Spouse Business Address:

Spouse Business Phone, Fax and Cell No.:

Client Period of Residence in North Carolina:

Spouse Period of Residence in North Carolina:

Child 1 Full Name:

Child 1 Date of Birth:

Child 2 Full Name:

Child 2 Date of Birth:

Child 3 Full Name:

Child 3 Date of Birth:

**II. Summary of Assets and Liabilities:** Generally, there is no federal estate tax for combined client and spouse assets of less than \$1,000,000.00. If you fall into this category, you may choose to skip this section.

Cash in Bank Accounts:

Individual Retirement Accounts:

Stocks and Bonds:

Real Estate:

Life Insurance (surrender value):

Automobiles:

Other Assets:

Mortgage on Real Estate:

Other Notes to Financial Institutions:

Loans on Insurance Policies:

Other Financial Liabilities:

**III. Dispositive Information:** Please list to whom you want to leave your assets in the event of your death. Please list alternates to receive each gift in the event the person you name precedes you in death.

Primary Beneficiary in Will (Client):

Primary Beneficiary in Will (Spouse):

Do you have any specific gifts you would like to leave to a specific person or charity?

Beneficiary of All Remaining Assets (Residuary Estate for Client):

Beneficiary of All Remaining Assets (Residuary Estate for Spouse):



Would you like a living will to express your desires concerning the use or non-use of medical procedures to prolong your life in case of terminal illness?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

In the event of your mental or medical incapacity, who would you want to take care of your...

- Financial Decisions (Primary and Alternates):

- Health Care Decisions (Primary and Alternates):

Do you want to discuss anything else? Please list:

**Complete and Return To:**  
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