

BERNETICH, HATZELL & PASCU, LLC
LAW OFFICES

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CHERRY HILL, NEW JERSEY 08034
WEBSITE: WWW.ESTATEPLANLAWYER.COM

ESTATE PLANNING - INQUIRY SHEET

TELEPHONE
(856) 795-3535

FACSIMILE
(856) 795-3322

Today's Date: _____

SPOUSE 1: _____ S.S. NO. _____ U.S. CITIZEN: YES NO

SPOUSE 2: _____ S.S. NO. _____ U.S. CITIZEN: YES NO

HOME ADDRESS: _____

OFFICE ADDRESS: _____

BIRTH DATE: _____ SPOUSE'S BIRTH DATE: _____

TELEPHONE: Home: _____ Office: _____ Cell (H): _____ (W): _____

EMAIL ADDRESSES (H): _____ (W): _____

Names of Children (indicate if step-child) and other Dependents	Birth Date	Marital Status	Spouse's Name	Grandchildren (Attach list if necessary)

Do any individuals have special needs? _____ Yes _____ No

TYPE OF ASSET	DESCRIPTION (Please (i) list the value in the appropriate columns to the right; (ii) attach separate itemized lists as needed)	VALUE OF ASSET OWNED BY SPOUSE 1	VALUE OF ASSET OWNED BY SPOUSE 2	VALUE OF ASSET OWNED JOINTLY
REAL ESTATE residence, business, other				
SECURITIES stocks, bonds, mutuals				
CASH bank a/c's, receivables, money markets				
RETIREMENT ACCOUNTS				
BUSINESS INTERESTS				

PERSONAL EFFECTS								
OTHER ASSETS, POTENTIAL INHERITANCE, ETC.								
LIFE INSURANCE	Insured	Company Name	Cash Value	Beneficiary	Policy Nos.	Face Amount	Face Amount	Face Amount
DEBTS AND OBLIGATIONS								

Notes/Comments: _____

You will need an **Executor** to administer each of your estates after your death. You should have more than one name. Your Executor can be an individual with successors or more than one individual acting together as Co-Executor.

	Husband, insert NAME and RELATIONSHIP	Wife, insert NAME and RELATIONSHIP
1		
2		
3		

We will prepare **Powers of Attorney**. A POA appoints an **Attorney-in-Fact** (also called agent) to handle your financial matters for you if you are unable. Your Attorney-in-Fact can be an individual with successors or more than one individual acting together as Co-Agents.

	Husband, insert NAME and RELATIONSHIP	Wife, insert NAME and RELATIONSHIP
1		
2		
3		

We will prepare and **Advance Directives for Health Care**. An ADHC appoints **Health Care Representatives** to access your health care records and to make medical decisions for you if you are unable. Your Health Care Representative can be an individual with successors or more than one individual acting together as Co- Health Care Representatives.

	Husband, insert NAME and RELATIONSHIP	Wife, insert NAME and RELATIONSHIP
1		
2		
3		

If you have **minor children**, state who you prefer to be the guardian(s) if you are not living.

	Insert NAME and RELATIONSHIP
1	
2	