

<b>BERNETICH, HATZELL &amp; PASCU, LLC</b>  LAW OFFICES	4 MUNN AVENUE CHERRY HILL, NEW JERSEY 08034  WEBSITE: WWW.ESTATEPLANLAWYER.COM
<b>ESTATE PLANNING – INQUIRY SHEET</b>	TELEPHONE (856) 795-3535 <span style="float: right;">FACSIMILE (856) 795-3322</span>

Today's Date: \_\_\_\_\_

SPOUSE 1 LEGAL NAME: \_\_\_\_\_  
 SPOUSE 2 LEGAL NAME: \_\_\_\_\_  
 HOME ADDRESS: \_\_\_\_\_  
 OFFICE ADDRESS: \_\_\_\_\_  
 BIRTH DATE: \_\_\_\_\_ SPOUSE'S BIRTH DATE: \_\_\_\_\_  
 TELEPHONE: CELL (SPOUSE 1): \_\_\_\_\_ (SPOUSE 2): \_\_\_\_\_ HOME: \_\_\_\_\_ OFFICE: \_\_\_\_\_  
 EMAIL ADDRESSES (SPOUSE 1): \_\_\_\_\_ (SPOUSE 2): \_\_\_\_\_

S.S. NO. \_\_\_\_\_ U.S. CITIZEN: YES ☐ NO ☐  
 S.S. NO. \_\_\_\_\_ U.S. CITIZEN: YES ☐ NO ☐

Legal 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 \_\_\_\_\_

Do you have any existing trusts? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, is it funded with any assets? Please provide a copy.

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, mutual				
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:

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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.

	Spouse 1, insert LEGAL NAME and RELATIONSHIP	Spouse 2, insert LEGAL NAME and RELATIONSHIP
1	First choice, spouse or other individual:	First choice, spouse or other individual:
2	Successor:	Successor:
3	Next successor:	Next successor:

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.

	Spouse 1, insert LEGAL NAME and RELATIONSHIP	Spouse 2, insert LEGAL NAME and RELATIONSHIP
1	First choice, spouse or other individual:	First choice, spouse or other individual:
2	Successor:	Successor:
3	Next successor:	Next successor:

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.

	Spouse 1, insert LEGAL NAME and RELATIONSHIP	Spouse 2, insert LEGAL NAME and RELATIONSHIP
1	First choice, spouse or other individual:	First choice, spouse or other individual:
2	Successor:	Successor:
3	Next successor:	Next successor:

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

	Insert NAME and RELATIONSHIP
1	First choice:
2	Second choice: