REDSTONE ARSENAL LEGAL ASSISTANCE
ESTATE PLANNING QUESTIONNAIRE WORKSHEET

NOTE: While the majority of individuals do not need complex estate planning, the only way to tell is by asking certain questions. This worksheet is intended to determine if you need a complex will, or if a basic will would be best for you. Answer the following questions as completely as possible:

1. Marital Status ☐ Married ☐ Single ☐ Widowed ☐ Divorced (check all that apply) ☐ Separated or about to divorce		
Circle or fill in your answers	**You**	**Your Spouse**
2. Are you a U.S. citizen?..........	Yes No	Yes No
3. Do you have a will or trust now? **	Yes No	Yes No
4. Are you expecting to receive property or money from (circle all that apply): .... If so, approximately how much?	Gift Inheritance Lawsuit Other $	Gift Inheritance Lawsuit Other $
5. Do you have any family considerations, such as a special needs child, that require specific mention in your will?..........	Yes No	Yes No
6. Have you ever lived in a Community Property State? (AZ,CA,ID,LA,NV,NM,TX,WA,WI,PR)→ In a community-property state, most property acquired during the marriage (except for gifts or inheritances) is owned jointly by both spouses and is divided upon divorce, annulment or death.	Yes No	Yes No
7. Do you have a pre-nuptial or post-nuptial agreement? **	Yes No	Yes No
8. Do you have a divorce decree that mentions pension, insurance, or other property rights? **	Yes No	Yes No
9. Do you or your spouse have any commercial life insurance policies and/or annuities, including SGLI or VGLI? If so, what is the total death benefit?	Yes No $	Yes No $
10. Do you or your spouse own a home or any other real estate? If so, what is the equity in that property?	Yes No $	Yes No $
11. Do you or your spouse own any other titled property, such as a car, boat, etc.? If so, what is the equity in that property?	Yes No $	Yes No $
12. Do you or your spouse have any checking or interest bearing accounts (savings, CDs)? If so, what is the approximate balance?	Yes No $	Yes No $
13. Do you or your spouse own any investments such as stocks or mutual funds (DO NOT include IRAs)? If so, what is the approximate balance?	Yes No $	Yes No $
14. Do you or your spouse have any profit sharing, IRAs or pension plans? If so, what is the current value?	Yes No $	Yes No $
***** If "yes' to questions 3, 7, or 8, you <u>MUST</u> bring these documents to your appointment***		

NOTE:

- If you answered "no" to Question 2, or if you answered "yes" to either Questions 7 or 8, you should complete a complex estate planning questionnaire.
- If you answered "yes" to any of Questions 9 through 14, you should total the dollar amounts, and if the total is $1 million or greater, you should complete a complex estate planning questionnaire. When in doubt, complete a complex estate planning questionnaire, as too much information is better than too little.