



LIFE PLANNING & FINANCIAL MANAGEMENT

ESTATE PLANNING QUESTIONNAIRE

Mail form back to: Visionary Horizons, Estate Planning Team, 620 Mabry Hood Road, Suite 102, Knoxville, TN 37932

Date: _____

	Client 1	Client 2
Name:		
Date of Birth:		
U.S. Citizen? (circle one)	YES NO	YES NO
Phone:		

Home Address: _____ Phone: _____
 _____ Email: _____ *

Do you have a will? (circle one) YES NO If Yes, what is the date on the will? _____

Who is your Estate Planning Attorney?
 (write NONE if you do not have one) _____

_____ States of Residence Since Marriage: _____

<u>Children</u> (Name, Date of Birth, and City of Residence):	<u>Grandchildren</u> (Name and Date of Birth):
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Because we cannot guarantee that electronic mail is secure, we will not send confidential information by electronic mail without your permission. Initial here (all clients) to signify such permission: _____*

Special Family Considerations: (Prior marriages; support obligations beyond immediate family; health problems, etc)

Describe any significant potential inheritances.

Have you made lifetime taxable gifts? _____ Have you filed gift tax returns? _____

Are you a trustee or guardian of someone's property or person? _____

Are you a beneficiary of a trust established by someone else? _____

ASSET SUMMARY
(Round to Even \$1,000)

Assets	Assets in Name of Client 1	Assets in Name of Client 2	Assets in Joint Name
Cash, Checking Accts., Savings Accts.			
Tangible Personal Property (Household effects, furniture, jewelry, etc.)			
Real Property – Residential Location and Value			
Other Real Property			
Stocks and Bonds			
IRA's 401(k), pension			
Business Interests – Describe generally; estimate value			
Total of Above			

Additional information:

LIABILITIES
(Round to Even \$1,000)

	Owed by Client 1	Owed by Client 2	Owed Jointly
Mortgages Owed			
Loans on Life Ins.			
Other			
Total of Above			

LIFE INSURANCE

Company	Type (Group, Ordinary, Life, Etc.)	Name of Insured	Name of Owner	Name of Beneficiary	Face Value	Annual Premium

Additional information:

Visionary Horizons Wealth Management is a Registered Investment Advisor that requires clients establish fee based accounts with the Schwab Institutional® division of Charles Schwab & Co., Inc. (Schwab), a FINRA-registered broker-dealer, member SIPC, to maintain custody of clients' assets and to effect trades for their accounts. Visionary Horizons Wealth Management is independently owned and operated and not affiliated with Schwab.

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Not insured by any state or federal agency.