Estate Planning Questionnaire

Having a comprehensive estate plan in place can help you feel more confident about the future and that your loved ones will be taken care of.

Before you can establish a plan for your estate you must first consider what you hope to achieve with the assets you distribute. Please fill out the questionnaire below to help us define your estate planning goals and objectives.

Date ____________________________

Name ____ DOB _________________________

Spouse's name ___________________________________ Spouse's DOB ________________

Mailing Address ____

Telephone Number ____

Email Address ____

Estate Planning Essentials

Do you have an existing will? Y ◯ N ◯

When was the last time it was updated? ____

Does it correctly state your intentions? Y ◯ N ◯

Who will handle your affairs if you become incapacitated? ______________________________

Do you have a Power of Attorney which grants another person the power to act on your behalf to manage your assets and pay your bills if you become incompetent or unable to sign your name?

Y ◯ N ◯

Do you have a Health Care Declaration (Living Will) stating your preference for health care if you are in a terminal condition? Y ◯ N ◯

Are you aware of the probate process being public? Y ◯ N ◯
Is this something you would prefer to avoid? Y ◯ N ◯

Are you aware of the cost basis of your investments? Y ◯ N ◯
(This will be important in determining future taxation of your assets)

Do you have a location where you keep all of your important estate planning and other documents? Y ◯ N ◯

If so, are your loved ones aware of the location? Y ◯ N ◯

Beneficiary Designations

Can you list the beneficiaries for all of your accounts? (life insurance, annuities, 401Ks, IRAs, etc.)

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When was the last time you reviewed or updated your beneficiary designations?_______________

Are your beneficiary designations per capita or per stirpes? ______________________________

Do you have concerns about how your beneficiaries will spend their inheritance? Y ◯ N ◯

Trust Planning

Have you considered how your assets will be distributed after your passing? Y ◯ N ◯

Would you prefer to control how your beneficiaries can spend their inheritance? Y ◯ N ◯

How will estate taxes be paid at your death? ____

Are you looking for ways to reduce the size of your estate? Y ◯ N ◯

Are you aware of changes regarding the Federal Estate Tax? Y ◯ N ◯

Your Oppenheimer Financial Advisor would be more than happy to do a thorough review of your estate plan to ensure that your assets are protected through life's inevitable changes.

Please contact us with questions:

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