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C O N F I D E N T I A L

PERSONAL ESTATE PLAN QUESTIONNAIRE - COUPLE

This questionnaire has been prepared to assist you in the compilation of preliminary information necessary to analyze, review and revise your personal estate plan. If you do not understand a question or if the information is not readily available, please indicate that on the questionnaire. Please realize not all the questions contained herein may apply to your estate. Some questions may be more easily answered by attaching documents or schedules from your files.

Date: _____

Marital Status: _____

Name: _____

Birth Date: _____

Spouse: _____

Birth Date: _____

Residence: _____

County: _____

City: _____

State: _____ Zip _____

Citizenship: U.S. _____ Other: _____

TELEPHONE NUMBERS:

SOCIAL SECURITY NUMBERS:

Home: _____

Husband: _____

Work (Husband): _____

Wife: _____

Work (Wife): _____

OCCUPATION:

EXPECTED RETIREMENT DATE:

Husband: _____

Wife: _____

HUSBAND'S EMPLOYER:

WIFE'S EMPLOYER:

(Name & Address)

(Name & Address)

Children: Please include names of all children born to or adopted by both or either of you, living or now deceased. If only one of you is a parent to a child, please identify the parent in the left margin.

FULL LEGAL NAME:

ADDRESS:

BIRTHDATE:

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

If either of you, any child, or some other person dependent upon you requires special care or treatment because of a disability, please explain below.

ESTATE:

Definition: When using the term Estate herein, we are referring to all of your possessions, including real property, business ownership, any type of financial account, cash, I.R.A.'s and other retirement accounts, personal belongings of any kind, monies owed to you and may include the face value of life insurance policies on your life. Your Net Estate is the total of all of your possessions of whatever nature, less any indebtedness you may owe.

Will your estate be utilized for your benefit during your lifetime(s), then for the benefit of the survivor (widow or widower) and then be distributed outright to your children equally upon the survivor's death (grandchildren by a deceased child taking the child's share)?

Yes _____ No _____

A. If the answer is "No," and you do not wish your entire estate to be utilized for the benefit of the surviving spouse during his or her lifetime, explain below how you wish your estate to be distributed at the time the first spouse dies:

B. If the answer is "No," and you do not wish your estate to be distributed outright to your children equally upon the death of the surviving spouse (with children of a deceased child taking that child's share), explain below how you wish your estate to be distributed at the time of death of the last surviving spouse:

C. Do you wish to make any specific bequests: Yes _____ No _____
If "Yes," explain:

If your combined (husband and wife) NET estate exceeds \$2,000,000.00 (in 2007) and you wish to avoid federal estate taxation through the use of a "by-pass trust," please so indicate on the line below. The attorney will then discuss with you the different by-pass trust alternatives available. NOTE: A "by-pass" trust is an instrument that would permit the transfer of up to \$2,000,000.00 to your heirs without federal estate taxation.

Yes _____ No _____

TRUSTEES:

Definition: A Trustee is the person who holds legal title to certain property and has been entrusted with the job of administering it for a beneficiary. The Trustee will be empowered, on your behalf (you will be the beneficiary), to manage whatever funds and property you place into the Trust. It should be a person or financial institution in which you place great confidence.

Who will be Trustee(s) while you are both still living?

TRUSTEE: _____

OR

CO-TRUSTEES: _____

If Co-Trustees, who do you want to control in a dispute? If neither, please so indicate.

If you have named yourself as Trustee, who will be Trustee(s) upon your death or disability (called "the Successor Trustee")?

First Successor Trustee: _____

Address: _____

Second Successor Trustee: _____

Address: _____

Have you carefully considered the advantages of a professional corporate Trustee, especially when minor children are involved as beneficiaries of the Trust?

Yes _____ No _____

We can provide you with additional information regarding this issue.

EXECUTOR:

Definition: An Executor is the person you appoint to see that your desires/instructions as set forth in your Will are carried out. It is the person who will make decisions as to distribution of personal property items in the event of a dispute between your beneficiaries, or who will be in charge of selling unwanted items and placing the money obtained therefrom into your Trust to be properly distributed. Your Executor may also need to prepare (or arrange for the preparation of) tax returns, and will be responsible to see that taxes are paid. You should select someone who resides in your State. You must indicate your Executor's place of residence.

Who will be your Executor?

Husband's Selection:

First Choice:

Address:

Second Choice:

Address:

Wife's Selection:

First Choice:

Address:

Second Choice:

Address:

GUARDIANS FOR MINORS:

Definition: A Guardian is the person you nominate, and who may thereafter be appointed by a Court to be legally responsible upon your death, for the care and management of your minor children and their possessions.

If you have minor children, who do you select as the guardian of their person or of their property in the event of your deaths?

Husband's Selection:

First Choice: Person _____

Address: _____

First Choice: Property _____

Address: _____

Second Choice: Person _____

Address: _____

Second Choice: Property _____

Address: _____

Wife's Selection:

First Choice: Person _____

Address: _____

First Choice: Property _____

Address: _____

Second Choice: Person _____

Address: _____

Second Choice: Property _____

Address: _____

PETS:

If you own a pet or pets, you may wish to make specific legal arrangements for the pet's care if anything were to happen to you. There are a number of ways this can be done. Even separate Trusts for the benefit of a pet are now permissible by Illinois law. If you wish to discuss the various possibilities for caring for a pet if you are unable to do so, please check the Yes box below and talk to the attorney about the specific situation when you have your initial meeting.

Yes _____
No _____

We have pets, but do wish to make any special arrangements: _____

HEALTHCARE POWER OF ATTORNEY:

Definition: A Healthcare Power of Attorney is a document whereby you legally give some person the right, authority and duty of making certain decisions in the event of your inability to make decisions as to your personal health care for reasons such as severe injury, unconsciousness, mental incapacity, senility, etc.

If you wish to have a Power of Attorney prepared that will give your named agent/representative the authority to make important health care decisions on your behalf, please provide the name, address, and phone number of the person(s) you would like to give that responsibility to:

Husband's Selection:

First Choice:

Address: _____
Telephone Number: (____) _____

Second Choice:

Address: _____
Telephone Number: (____) _____

Wife's Selection:

First Choice:

Address: _____
Telephone Number: (____) _____

Second Choice:

Address: _____
Telephone Number: (____) _____

If you wish your Agent to have the authority to make gifts to any or all of the following, but in amounts not to exceed the amount of the annual gift tax exclusion or the amount of the unified credit as set forth in the Internal Revenue Code in effect at the time of the gift, please check the individuals and/or organizations named hereinbelow you wish to gift to:

_____ Individuals _____ Children _____ Agent
_____ Charitable Organizations _____ Other

NOTE: Your Trustee or Successor Trustee will manage those assets which have been transferred into your Trust, if you have one. The agent you designate under a Durable Power of Attorney for Property will be responsible only for those assets that have not been transferred into your Trust, for whatever reason. *If you plan to transfer substantially all of your assets to your Trusts, you probably do not need a Power of Attorney for Property.*

Husband's Selection:

First Choice: _____
Address: _____

Second Choice: _____
Address: _____

Wife's Selection:

First Choice: _____
Address: _____

Second Choice: _____
Address: _____

LIVING WILL

Definition: A Living Will is a document which sets forth your intent regarding "artificial" life support if your condition is incurable and considered terminal by your physician. The standard form provides that you when your condition is terminal and irreversible you do not want extraordinary means used to delay death.

Do you wish to have a Living Will prepared for you?

HUSBAND: Yes _____ No _____ **WIFE:** Yes _____ No _____

If you have already signed a Living Will, there may be no need for a new one to be prepared. However, one of our attorneys should review the document you have previously signed.

MISCELLANEOUS

CHARITABLE CONTRIBUTIONS:

If you wish to have your estate contribute to a church or charitable organization, explain below:

1. When the first spouse dies, or when the surviving spouse dies?

2. How much, a fixed amount or percentage of the estate?

3. List exact names and addresses of charities. Please consider providing us with at least one alternate.

a. _____

b. _____

c. _____

OTHER CONSIDERATIONS:

If you have other issues to address in this estate plan, please explain them below. One example would be if, upon the death of the first of you to die, you want to provide your spouse with income to live comfortably on for the rest of his or her life, but you want the trust to be distributed to your children after the death of the surviving spouse. This is especially useful in cases of 2nd marriages.

NOTE: Information as to burial requests and memorial services and other remembrances, etc. need not be listed here. Those issues can be taken care of once you have received your Estate Planning Binder, which will give instructions for handling those types of considerations.

REAL ESTATE TRANSFERS:

_____ If you own Real Property and need legal assistance with the transfer of ownership into your Trust(s), in the left margin please fill in the **NUMBER** of properties you wish assistance with and attach to this Application a copy of the Deed pertaining to each property. Additionally, please provide us with the Permanent Index Number (PIN), which can be found on your property tax bill. The Deed(s) must show how title is presently held. Appropriate Deeds will be prepared and ready for execution at the time you sign the other documentation, and we will arrange for the recording of those Deeds. After they have been properly recorded, the original Deeds will be forwarded to you for retention with the rest of your documentation. We cannot guarantee that this process will transfer title to the Trust. That can only be done by a title search or an update of your current Title Insurance Policy. We recommend that you obtain such a search or update if it has not been done in some time, i.e. twenty (20) years, or if you cannot find your Title Insurance Policy.

LARGE ESTATES:

If your combined estate exceeds \$2,000,000.00 and you wish to plan to avoid or reduce federal estate taxes upon the death of the surviving spouse, there are other estate planning techniques you may wish to learn about and consider. Please indicate in the margin below if you wish to discuss:

- _____ Irrevocable Life Insurance Trusts
- _____ Qualified Personal Residence Trusts
- _____ Charitable Trusts
- _____ Family Partnerships or Limited Liability Companies
- _____ Lifetime Gifting
- _____ Other Irrevocable Trusts including Generation Skipping Trusts