



## Basic Client Questionnaire

Every person--no matter their marital status, age, state of residence, number of children or net worth--needs to have basic estate planning documents. These documents include a simple will, health care power of attorney, durable general power of attorney for financial affairs, and a living will. These basic documents **limit or eliminate the discretion of the government to decide a number of issues for you** in a way you may have never intended. *The Ratloff Law Firm offers an affordable basic document package that often costs only a few hundred dollars to address these issues.* Upon submission of the form below, one of our attorneys will review the information and follow up with you to briefly discuss whether a basic document will handle your needs or if something more comprehensive is needed. If more comprehensive planning is recommended, then we will ask you to complete our Advanced Client Questionnaire.

### Information About You:

Name(s): \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Email: \_\_\_\_\_

### Please check the appropriate box below and answer questions on back if warranted:

	YES	NO	
Do you have children?			If Yes, see question 1 on back
Are you currently married?			
Have you been married more than once?			
Do you have a retirement account (401k, IRA, etc)?			If Yes, see question 2 on back
Do you have a business?			If Yes, see question 3 on back
Do you have investment real estate?			If Yes, see question 4 on back
Do you have a desire to protect assets from potential creditors?			
Do you have life insurance?			If Yes, see question 5 on back
Is someone close to you unable to care for themselves ("special needs")?			If Yes, see question 6 on back
Do you own real estate outside your state of residence?			If Yes, see question 7 on back
Are all of your assets, including death benefit of life insurance, worth more than one million dollars?			
Do you have an annuity?			
Are you required to carry professional liability insurance?			
Are current estate planning documents over 3 years old?			
Do you hold more than a simple checking account (i.e., an investment account, CD's, money market, etc.) in joint tenancy with another person or your spouse?			If Yes, see question 8 on back
Do you intend to leave everything outright to your spouse, and then equally to children (if you have children)?			If No, an attorney will discuss with you in more detail.

**ATTACH SEPARATE PAGES BELOW WHERE NEEDED:**

1. Names, ages and marital status of children? Are any step-children?
  
2. List your retirement accounts, estimated values and current beneficiary.
  
3. Briefly describe your business including your estimated yearly net income (except business primarily holding real estate).
  
4. Identify the number of investment real estate properties and value. If held in a company, list company and estimated value of properties within.
  
5. Identify, if possible, the type(s) of policies (Permanent? Term?) and the death benefit.
  
6. Describe your relation to them and what, if any, type of care you would like to aid in providing.
  
7. List the states and number of real estate properties in each state ***not held in a company***.
  
8. Describe the number of investment accounts and with whom they are associated.

**ANSWER THE FOLLOWING TO THE BEST OF YOUR ABILITY. YOU CAN CHANGE YOUR ANSWER AT ANY TIME. Who would you name to be...**

Choice:	Executor of your Estate:	Guardian for Minor Children:	A person to care for you if you can't care for yourself (excluding spouse):
1 <sup>st</sup>			
2 <sup>nd</sup>			