SADOVNICK MORGAN LLP

CHARTERED PROFESSIONAL ACCOUNTANTS

A FEW QUESTIONS REGARDING YOUR ESTATE PLAN

A number of our clients find it useful to keep their important estate planning documents with a third party, often their accountant. As such, we are requesting that our clients provide us with basic information related to their estate. This will help us better plan your estate as well as act as a resource for your family if needed. In order to help us, please complete the below basic questionnaire.

<u>IF YOU HAVE COMPLETED IN PRIOR YEARS, PLEASE ONLY PROVIDE IF CHANGED</u>

YOUR NAME: ______________________________

YOUR BENEFICIARIES: ______________________________

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YOUR EXECUTOR: ______________________________ **AGE?** __________

When did you last review your overall legacy / estate plan? __________

Do you have a Power of Attorney in place? Y N Who is it? __________

Do you have a Representation Agreement for Healthcare? Y N

Where is your will? ______________________________

Do you have a Will? Y N When was it last updated? __________

Do you have life insurance? Y N

When did you last review your life insurance needs? __________

Are you the beneficiary or trustee of any trusts, including alter ego trusts? Y N

Do you have any charitable gifts that you are planning to make with your estate? Y N

What are the names of your other advisor(s)?

Lawyer: ______________________________

Insurance: ______________________________

Investments: ______________________________

Banker/Bank: ______________________________

Other: ______________________________

Are you (or beneficiaries/trustees) a US Citizen, resident or Green Card Holder? Y N

Do you have any US assets (including real estate and US stock?) Y N

If you have any specific concerns that you would like to discuss with us, please reach out and we will arrange a time to meet.