

LAW OFFICE OF
DAVID E. HUNT

511 Congress Street • Portland • Maine 04101-3464
www.mainewills.com

Telephone: (207) 773-5100
Telecopier: (207) 773-8200
E-mail: dhunt@mainewills.com

MARRIED COUPLE'S ESTATE PLANNING INFORMATION

Part I: Personal Information

1. Your full name: _____
2. Your spouse's full name: _____
3. Any other names by which either of you has ever been known: _____

4. Your mailing address: _____
5. Telephone numbers: Home: _____ Work: _____
6. What county do you live in? _____
7. Dates of birth: Self: _____ Spouse: _____
8. Social Security numbers: Self: _____ Spouse: _____
9. Please list your children, if any:

	<i>Name</i>	<i>Hometown</i>	<i>Birthdate</i>	<i>Married or Single</i>
(a)	_____			
(b)	_____			
(c)	_____			
(d)	_____			
(e)	_____			
(f)	_____			

10. Do you (or does your spouse) have any adopted children? _____
11. Do you (or does your spouse) have any children with disabilities or special needs? _____

12. Please list your grandchildren, if any:

(a) Your child: _____

Name

Birthdate

His or her children:

_____	_____
_____	_____
_____	_____
_____	_____

(b) Your child: _____

His or her children:

_____	_____
_____	_____
_____	_____
_____	_____

(c) Your child: _____

His or her children:

_____	_____
_____	_____
_____	_____
_____	_____

(d) Your child: _____

His or her children:

_____	_____
_____	_____
_____	_____
_____	_____

Please attach additional sheets if necessary.

13. Please tell us about your parents:

	<i>Name</i>	<i>Hometown</i>	<i>Birthdate</i>	<i>Deceased, Married or Single,</i>
(a)	_____	_____	_____	_____
(b)	_____	_____	_____	_____

14. Please tell us about your spouse's parents:

	<i>Name</i>	<i>Hometown</i>	<i>Birthdate</i>	<i>Deceased, Married or Single,</i>
(a)	_____	_____	_____	_____
(b)	_____	_____	_____	_____

15. Please tell us about your employer:

(a) Your employer: _____

(b) Years there: _____

(c) Position: _____

16. Please tell us about your spouse's employer:

(a) Your spouse's employer: _____

(b) Years there: _____

(c) Position: _____

17. Please tell us about your marital situation:

(a) Has either of you been married before? _____

(b) If yes, when and for how long? _____

(c) Name of the former spouse: _____

(d) Where was the marriage to the former spouse performed? _____

(e) Where and when was the divorce finalized? _____

(f) If the former spouse is deceased, when did his or her death occur? _____

(g) List any children of the former marriage: _____

(h) Please describe any alimony or child support to which you (or your spouse) or any former spouse is entitled as a result of a previous marriage, and attach a copy of the settlement agreement or court order under which the entitlement arises:

(i) Where did you and your current spouse get married? _____

(j) When did you and your current spouse get married? _____

(k) Have you and your spouse entered into any premarital or postmarital agreement affecting your rights in each other's property? _____ If yes, please attach a copy.

(l) Since your marriage to your current spouse, have you lived in any of the following places? Puerto Rico, the U. S. Virgin Islands, Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, Wisconsin, or anyplace outside the United States?

If yes, please list where you have lived and for how long:

(m) Have you (or has your spouse) ever served in the military? _____ If so, please list the branch, date of discharge and serial number.

(n) List each country of which you are a citizen: _____

(o) List each country of which your spouse is a citizen: _____

Part II: Information About Your Assets

1. Please put an estimated value on each asset owned by you or your spouse and indicate which of you owns the asset by listing it in the appropriate column.

ASSETS

<i>Asset</i>	<i>Owned by Husband</i>	<i>Owned by Wife</i>	<i>Owned Jointly</i>
Home _____			
Vacation home _____			
Other real estate _____			
Other real estate _____			
Checking accounts _____			
Savings accounts _____			
Certificates of deposit _____			
Mutual funds _____			
Marketable securities _____			
Life insurance (at face value) _____			
Furniture _____			
Automobiles _____			
Annuities _____			
Jewelry _____			
Collectibles _____			
IRAs _____			
401(k) or Keogh plans _____			
Other qualified plans _____			
Non-qualified retirement plans _____			
Other assets _____			
TOTAL ASSETS _____			

LIABILITIES

<i>Liability</i>	<i>Of Husband</i>	<i>Of Wife</i>	<i>Joint</i>
Mortgage on home	_____	_____	_____
Other mortgage	_____	_____	_____
Other mortgage	_____	_____	_____
Auto loans	_____	_____	_____
Other debt	_____	_____	_____
Other debt	_____	_____	_____
Other debt	_____	_____	_____
TOTAL LIABILITIES	_____		

NET WORTH

Total assets minus
total liabilities _____

COMBINED NET WORTH

Sum of the "Net Worth" amounts from all three columns above: _____

2. Is any of your debts insured? _____ If yes, which? _____

3. Have you (or has your spouse) ever filed a federal gift tax return? _____
If yes, please attach a copy of each such return.

4. Have you (or has your spouse) established any trusts? _____ If yes, please attach a copy of
each instrument, give the name and address of the current trustee or trustees under each such instrument
and provide an approximate current valuation of the assets held under it.

5. Are you (or is your spouse) the current or prospective beneficiary or trustee under a trust instrument
established by any other person? _____ If yes, please attach a copy of the governing instrument and
provide an approximate valuation of the assets held under it.

6. Are you (or is your spouse) the owner of any oil or gas exploration interests? _____
If yes, please describe them and attach copies of any available documentation such as mineral deeds or
division orders.

7. Please attach a copy of the deed by which you (or your spouse) took title to each parcel of real estate
you currently own.

8. Are you (or is your spouse) involved in a closely held business? _____

If yes, what is its name? _____

How is it organized (i.e., proprietorship, partnership, corporation, etc.)? _____

Name the people who own it with you (or your spouse): _____

What percentage of the business do you (or does your spouse) own? _____

Do you (or does your spouse) have a buy/sell agreement with the co-owners? _____

If yes, please attach a copy.

Part III: Other Information

1. Do you have an accountant? _____ If yes, please provide his or her name, address and phone number.

2. Do you have an investment advisor or financial planner? _____ If yes, please provide his or her name, address and phone number.

3. Are there any charitable organizations you are involved in or interested in supporting? _____ If yes, please name them.

4. If you were to die before all of your children reached adulthood, who would you want to look after them?

5. Whom would you and your spouse like to name as the executors of your wills?

6. Please give the date on which you completed this questionnaire. _____

Please attach copies of any wills you and your spouse currently have and, if you like, list on attached sheets any particular considerations you would like taken into account as we develop your estate plan. Then return this questionnaire to us at the address shown on the first page. We will be in touch with you shortly to arrange a meeting time, and we look forward to working with you.