

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

SINGLE PERSON'S ESTATE PLANNING INFORMATION

Part I: Personal Information

1. Your full name: _____
2. Any other names by which you have ever been known: _____
3. Your mailing address: _____
4. Telephone numbers: Home: _____ Work: _____
5. What county do you live in? _____
6. Your date of birth: _____
7. Your Social Security number: _____
8. 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)	_____	_____	_____	_____

9. Do you have any adopted children? _____
10. Do you have any children with disabilities or special needs? _____

11. Please list your grandchildren, if any:

	<i>Name</i>	<i>Birthdate</i>
(a) Your child: _____		
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.

12. Please tell us about your parents:

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

13. Please tell us about your employer:

(a) Your employer: _____

(b) Years there: _____

(c) Position: _____

14. Please tell us about your marital situation:

(a) Have you ever been married? _____

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

15. Have you ever served in the military? _____ If so, please list the branch, date of discharge and serial number.

16. List each country of which you are a citizen: _____

Part II: Information About Your Assets

1. Please put an estimated value on each asset owned by you in your own name alone or jointly with another person and, in the case of joint property, indicate who the joint owner is.

ASSETS

<i>Asset</i>	<i>Owned by You Alone</i>	<i>Owned Jointly</i>	<i>Name of Co-Owner</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>Yours Solely</i>	<i>Yours Jointly With Another</i>	<i>Name of the Joint Obligor</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 _____

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

3. Have you ever filed a federal gift tax return? _____ If yes, please attach a copy of each such return.

4. Have you established any trusts? _____ If yes, please attach a copy of each trust 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 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 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 took title to each parcel of real estate you currently own.

8. Are you 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: _____

What percentage of the business do you own? _____

Do you 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 like to name as the executor of your will?

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

Please attach a copy of your current will, if any, 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.