

# McCormick Braun Friman, LLC

217 North Jefferson St. Chicago, IL 60661 [www.mbfllegal.com](http://www.mbfllegal.com)

## *Basic Estate Planning Questionnaire*

With our expertise and strategic solutions crafting an Estate Plan has never been so easy! This quick six step questionnaire will provide our firm with all of the information needed to begin creating your estate plan. Take a few moments to give yourself the gift of peace of mind which will last a lifetime. Upon completion of this questionnaire please mail it to our offices at:

McCormick Braun Friman, LLC  
217 North Jefferson St. (1<sup>st</sup> Floor)  
Chicago, IL 60661

or email it to our Estate Planning Coordinator, Jessica, at [jessica@mbfllegal.com](mailto:jessica@mbfllegal.com). Should you have any questions feel free to give us a call at (312) 327-3402.

*Planning for your future and your family's future has never been so simple.*

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## Basic Estate Planning Questionnaire

### Step 1

NAME	SPOUSE'S NAME
DATE OF BIRTH	SPOUSE'S DATE OF BIRTH
CITIZENSHIP	CITIZENSHIP
SOCIAL SECURITY NUMBER	SPOUSE'S SOCIAL SECURITY NUMBER
OCCUPATION	SPOUSE'S OCCUPATION
E-MAIL ADDRESS	SPOUSE'S E-MAIL ADDRESS
BUSINESS TELEPHONE/FAX	SPOUSE'S BUSINESS TELEPHONE/FAX
HOME TELEPHONE/FAX	HOME ADDRESS
PREFERRED MAILING ADDRESS	CELLULAR PHONE(S)

Marital Status?

Married

Single

Have you or your spouse previously been married?

Yes

No

Have you or your spouse ever lived in a community Property state during your marriage? (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, and Wisconsin)

Yes

No

## Step 2

If you have a child, grandchild or other descendant, please provide the request information using this sheet and if needed, attach additional pages. Indicate if the relative is a child, grandchild or other relative and whether the relative is through the Husband, Wife or Both.

NAME	RELATIONSHIP	DATE OF BIRTH
ADDRESS		

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ADDRESS		

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ADDRESS		

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ADDRESS		

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ADDRESS		

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ADDRESS		

NAME	RELATIONSHIP	DATE OF BIRTH
ADDRESS		

### Step 3

**EXECUTOR(S):** The executor's job is to discharge the estate in accordance with your wishes expressed in your will. It is a relatively short term job lasting approximately six months.

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### Step 4

**TRUSTEE(S):** As the grantor of your living trust, or with trusts set out in your will, you may appoint anyone of legal age to act as your trustee. The function of the trustee is to manage the trust property. During your lifetime, you (and your spouse) may act as trustee (co-trustees). This allows you absolute control of your own property while you are alive. Appoint your trustee(s) for and during your lifetime:

- I will act as my sole trustee.
- My spouse and I will act as co-trustees.
- I wish to use a corporate trustee.
- I will act as a co-trustee along with: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Step 5

#### **GUARDIANS FOR MINOR CHILDREN**

Please choose a responsible adult that you trust will raise your children in accordance with your wishes in the event that something happens to you and your spouse.

CHOICE #1 NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_

CHOICE #2 NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_