

Please complete and return to Steve Krueger, Steven C. Krueger Legal Services LLC, 3300 NE Ralph Powell Road, Lee's Summit, MO 64064; Telephone: 816-246-9981; Email: steve@kruegerlegal.com

STEVEN C. KRUEGER LEGAL SERVICES LLC

ESTATE PLANNING QUESTIONNAIRE

Date: _____

FAMILY DATA

HUSBAND:

Name: _____ Birthdate: _____

Home Address: _____
STREET CITY ZIP

Home Phone: (____) _____ Email Address: _____

Business Address: _____
STREET CITY ZIP

Business Phone: (____) _____ (Ext.) SSN: _____

Military Service: _____

WIFE:

Name: _____ Birthdate: _____

Maiden Name: _____

Home Address: _____
(If not entered above) STREET CITY ZIP

Home Phone: (____) _____ Email Address: _____

Business Address: _____
STREET CITY ZIP

Business Phone: (____) _____ (Ext.) SSN: _____

Military Service: _____

FAMILY:

Date and Place of Marriage: _____

Marital History (divorces, deaths and remarriages): _____

Children by present and former marriages and by adoption:

Name	Birthdate	Marital Status	Spouse/Children
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Dependents:

Name	Relationship	Obligation	Support
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

INSURANCE

	Type & Company	Beneficiary(ies)	Face Amount
Life-Husband	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

	Type & Company	Beneficiary(ies)	Face Amount
Life-Wife	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
Accidental Death Husband	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
Accidental Death Wife	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
TOTALS:	_____	_____	_____

LIABILITIES

	Husband's	Wife's	Joint
Loans	\$ _____	\$ _____	\$ _____
Mortgages on Real Estate Family Home	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____
Other Debts	\$ _____	\$ _____	\$ _____

MISCELLANEOUS

	Husband	Wife	Children
Inheritance (other than your estate)	\$ _____	\$ _____	\$ _____
Existing Trust Funds	\$ _____	\$ _____	\$ _____

ANNUAL INCOME

	Husband	Wife	Joint
Salary	\$ _____	\$ _____	\$ _____
Bonus	\$ _____	\$ _____	\$ _____
Commission	\$ _____	\$ _____	\$ _____
Interest	\$ _____	\$ _____	\$ _____
Dividends	\$ _____	\$ _____	\$ _____
Other Income	\$ _____	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____	\$ _____

ASSETS
(Current Market Value)

	Husband	Wife	Joint
Checking Account	\$ _____	\$ _____	\$ _____
Savings Account	\$ _____	\$ _____	\$ _____
Stocks	\$ _____	\$ _____	\$ _____
	Husband	Wife	Joint

Mutual Funds	\$ _____	\$ _____	\$ _____
Bonds	\$ _____	\$ _____	\$ _____
Deeds of Trust	\$ _____	\$ _____	\$ _____
Family Home	\$ _____	\$ _____	\$ _____
Other Real Estate (show state where located)	\$ _____	\$ _____	\$ _____
Pension, Profit-Sharing & Retirement Benefits	\$ _____	\$ _____	\$ _____
(Other Personal Property) Automobile	\$ _____	\$ _____	\$ _____
Household Furnishings	\$ _____	\$ _____	\$ _____
Other (Jewelry, etc.)	\$ _____	\$ _____	\$ _____
Other Business Interests (describe)	\$ _____	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____	\$ _____

Additional remarks, if any:
