

ESTATE PLANNING QUESTIONNAIRE

Date prepared: _____

We use this questionnaire to get a general understanding of your situation so that we can better advise you on your estate planning. Please be as complete as possible when answering this questionnaire. If any of the requested information does not apply or is not readily available, leave those sections blank. Feel free to attach any additional information you would like to provide us. Be assured that our clients' personal information is kept confidential.

PERSONAL & CONTACT INFORMATION

| | PERSON A | PERSON B |
|--|--|--|
| 1. Full Legal Name (including middle name) | | |
| 2. Nicknames/Alia | | |
| 3. Date of Birth | | |
| 4. Social Security No. | ~ to be provided in person | ~ to be provided in person |
| 5. Are you a U.S. Citizen? If not, list country of citizenship | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 6. Home Address | | |
| 7. Home Phone | | |
| 8. Cell Phone | | |
| 9. E-mail | | |
| 10. Occupation | | |
| 11. Employer | | |
| 12. Business Address | | |
| 13. Business Phone | | |

MARRIAGE

- Are you currently married? ☐ Yes ☐ No
- If married, have you ever lived in a community property state? (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington or Wisconsin). If so, please circle.
- Have you been previously married? ☐ Yes ☐ No If so, provide details (dates of marriage, death, divorce, etc.) of previous marriages: _____

Chapter A The Client Interview Estate Planning And Probate

Lingsheng Yao



Chapter A The Client Interview Estate Planning And Probate:

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Table of Contents Chapter A The Client Interview Estate Planning And Probate

1. Understanding the eBook Chapter A The Client Interview Estate Planning And Probate
 - The Rise of Digital Reading Chapter A The Client Interview Estate Planning And Probate
 - Advantages of eBooks Over Traditional Books
2. Identifying Chapter A The Client Interview Estate Planning And Probate
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Chapter A The Client Interview Estate Planning And Probate
 - User-Friendly Interface
4. Exploring eBook Recommendations from Chapter A The Client Interview Estate Planning And Probate
 - Personalized Recommendations
 - Chapter A The Client Interview Estate Planning And Probate User Reviews and Ratings
 - Chapter A The Client Interview Estate Planning And Probate and Bestseller Lists
5. Accessing Chapter A The Client Interview Estate Planning And Probate Free and Paid eBooks

- Chapter A The Client Interview Estate Planning And Probate Public Domain eBooks
- Chapter A The Client Interview Estate Planning And Probate eBook Subscription Services
- Chapter A The Client Interview Estate Planning And Probate Budget-Friendly Options
- 6. Navigating Chapter A The Client Interview Estate Planning And Probate eBook Formats
 - ePub, PDF, MOBI, and More
 - Chapter A The Client Interview Estate Planning And Probate Compatibility with Devices
 - Chapter A The Client Interview Estate Planning And Probate Enhanced eBook Features
- 7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Chapter A The Client Interview Estate Planning And Probate
 - Highlighting and Note-Taking Chapter A The Client Interview Estate Planning And Probate
 - Interactive Elements Chapter A The Client Interview Estate Planning And Probate
- 8. Staying Engaged with Chapter A The Client Interview Estate Planning And Probate
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Chapter A The Client Interview Estate Planning And Probate
- 9. Balancing eBooks and Physical Books Chapter A The Client Interview Estate Planning And Probate
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Chapter A The Client Interview Estate Planning And Probate
- 10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
- 11. Cultivating a Reading Routine Chapter A The Client Interview Estate Planning And Probate
 - Setting Reading Goals Chapter A The Client Interview Estate Planning And Probate
 - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Chapter A The Client Interview Estate Planning And Probate
 - Fact-Checking eBook Content of Chapter A The Client Interview Estate Planning And Probate
 - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development

- Exploring Educational eBooks
- 14. Embracing eBook Trends
 - Integration of Multimedia Elements
 - Interactive and Gamified eBooks

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