Adrian & Pankratz, P.A.
301 North Main Street
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Phone (316) 283-8746
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ESTATE PLANNING QUESTIONNAIRE

GENERAL INFORMATION

Marital Status: ☐ Single ☐ Married ☐ Unmarried, with long-term partner ☐ Widowed

Client Name Information

First Name: _______________ Middle: ________________ Last: ______________________

Gender: ☐ Male ☐ Female SS#: ___________________ DOB: ________________

U.S. Citizen? ☐ Yes ☐ No

Spouse/Partner Name Information

First Name: _______________ Middle: _______________ Last: _______________________

Gender: ☐ Male ☐ Female SS#: ________________ DOB: ________________

U.S. Citizen? ☐ Yes ☐ No DOD (if applicable): ________________

Contact Information

	Client	Spouse/Partner
Mailing Address		
City		
State		
Zip		
Home Phone		
Personal Email		
Cell Phone		
Business Phone		
Business Email		

Referral Information: Who referred you to this office? ________________________________

CHILDREN (if applicable)

	Name	Living	Gender	Date of Birth	Child of Both	Child of Client only	Child of Spouse only
Child 1		Y / N	M/F		Y / N	Y / N	Y / N
Address							
Child 2		Y / N	M/F		Y / N	Y / N	Y / N
Address							
Child 3		Y / N	M/F		Y / N	Y / N	Y / N
Address							
Child 4		Y / N	M/F		Y / N	Y / N	Y / N
Address							
Child 5		Y / N	M/F		Y / N	Y / N	Y / N
Address							

Guardian(s) for minor or disabled children (if applicable):

Name	Address

FINANCIAL AGENTS (Executor, Trustee, Business Power of Attorney)

CLIENT'S EXECUTORS

Name Address Phone / Email

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SPOUSE/PARTNER'S EXECUTORS

Name Address Phone / Email

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___

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HEALTH AGENTS (Health Care Power of Attorney)

CLIENT'S AGENTS

Name	Address	Phone / Email

SPOUSE/PARTNER'S AGENTS

Name	Address	Phone / Email

DISTRIBUTION INSTRUCTIONS

CLIENT'S DISTRIBUTION INSTRUCTIONS

Name of Recipient	Relationship	Description of property

SPOUSE/PARTNER'S DISTRIBUTION INSTRUCTIONS

Name of Recipient	Relationship	Description of property

ASSETS AND LIABILITIES

Home	$______________
Other Real Estate	$______________
Automobiles/Personal Property	$______________
Bank Accounts	$______________
Stocks & Bonds	$______________
Individual Retirement Accounts (IRAs)	$______________
Other Retirement Plans	$______________
Other Assets	$______________
TOTAL ASSETS	**$______________**
Home Mortgage	$______________
Other Debts	$______________
TOTAL LIABILITIES	**$______________**