SYNTERO

244 Front Street
Danville, CA 94526
Phone: 925.905.9050
Fax: 925.905.9051
www.synterogroup.com

CONFIDENTIAL

ESTATE PLANNING QUESTIONNAIRE
INSTRUCTIONS

Thank you for choosing our firm for your estate planning needs. This *Estate Planning Questionnaire* and attached supplementary worksheets are designed to help organize your assets so that all may be taken into consideration during the creation of your estate plan. Please take your time to answer all questions thoroughly and to the best of your ability. Should you have any questions while completing your form(s), please contact our office. Please also feel free to note your questions at the bottom of this page and bring it with you to discuss at your planning meeting.

DOCUMENTS & INFORMATION NEEDED

Please refer to the following checklist to ensure that you have provided us with all necessary documents and information we will need prior to your planning meeting to effectively serve you:

- ☐ Copy of your current trust (and all amendments), if applicable
- ☐ Copy of your current Will, or of latest Will and any codicils to that Will, if applicable
- ☐ Copy of any other documents that may impact the structuring of your Estate Plan (such as prenuptial agreements)
- ☐ Completed *Estate Planning Questionnaire*
- ☐ Copy of each clients' current Photo Identification
- ☐ *Real Property* supplementary worksheet(s), if applicable
    - ☐ Copy of the current property tax or assessor's bill for each parcel of property owned
- ☐ *Bank, Brokerage & Other Financial Accounts* supplementary worksheet(s), if applicable
    - ☐ Copy of most recent financial account statements
- ☐ *Annuity, Retirement Plans & Other Financial Assets* supplementary worksheet(s), if applicable
    - ☐ Copy of most recent policy and/or account statements
- ☐ *Miscellaneous Assets* supplementary worksheet(s), if applicable

You may submit these items via your secure Client Portal (instructions for access will be emailed to you), or regular mail or in-person delivery to our office.

QUESTIONS FOR THE ATTORNEY