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CONFIDENTIAL

ESTATE PLANNING QUESTIONNAIRE

ANNUITIES, RETIREMENT PLANS & OTHER FINANCIAL ASSETS WORKSHEET

Date: ______________________________

CLIENT 1 NAME	
CLIENT 2 NAME	

ABOUT THIS WORKSHEET

This is a supplementary worksheet to the Syntero Group *Estate Planning Questionnaire* . Please list all annuity, Individual Retirement Accounts (IRAs), pensions, retirement plans, 401(K)s, profit-sharing, and life insurance policies vested in your name. For each account, **please provide a copy of the most recent statement.**

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Type of Asset	☐ Annuity ☐ Individual Retirement Account (IRA) ☐ Pension ☐ Retirement Plan ☐ 401(K) ☐ Profit-Sharing ☐ Life Insurance
Description (if needed)	
Estimated Value	$
Owned by	☐ Client 1 ☐ Client 2 ☐ Other:
Beneficiary or Beneficiaries	

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Type of Asset	☐ Annuity ☐ Individual Retirement Account (IRA) ☐ Pension ☐ Retirement Plan ☐ 401(K) ☐ Profit-Sharing ☐ Life Insurance
Description (if needed)	
Estimated Value	$
Owned by	☐ Client 1 ☐ Client 2 ☐ Other:
Beneficiary or Beneficiaries	

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Type of Asset	☐ Annuity ☐ Individual Retirement Account (IRA) ☐ Pension ☐ Retirement Plan ☐ 401(K) ☐ Profit-Sharing ☐ Life Insurance
Description (if needed)	
Estimated Value	$
Owned by	☐ Client 1 ☐ Client 2 ☐ Other:
Beneficiary or Beneficiaries	

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