

# Charitable Giving Estate Planning Questionnaire

## Personal Information

Full Name

Address

Phone Number

Email

## Family Information

Marital Status

List of Children/Dependents

## Charitable Goals

Charitable Organizations You Wish to Support

Purpose or Cause You Wish to Support

Estimated Amount/Percentage of Estate to Donate

## Assets

List Your Major Assets (real estate, retirement accounts, investments, etc.)

## Planned Giving Tools

Types of Charitable Gifts Being Considered

Details/Comments

## Additional Notes

Other Considerations or Wishes