

Estate Planning Questionnaire for High-Net-Worth Individuals

Personal Information

Full Name

Date of Birth

Address

Phone Number

Email Address

Citizenship(s)

Marital Status

Family Information

Spouse/Partner Name

Children (Names & DOB)

Other Dependents

Assets

Real Estate Holdings

Bank Accounts (Location, Type)

Investment Portfolios

Business Interests

Valuable Personal Property

Other Assets

Liabilities

Mortgages

Loans & Other Debts

Trusts & Estate Plans

Do you have existing trusts?

Details of current trust/estate plans

Gifting & Charitable Intentions

Gifting Plans

Charitable Organizations

Advisors

Attorney

Accountant

Financial Advisor

Other Professional Advisors

Additional Notes & Objectives