

# International Assets Estate Planning Questionnaire

## Personal Details

Full Name

Date of Birth

Citizenship(s)

Country of Residence

## Family Information

Spouse/Partner Name

Children (Names & Birthdates)

## International Assets Overview

Real Estate Holdings (Address, Country, Value)

Foreign Bank Accounts (Bank, Country, Type)

Investments (Stocks, Bonds, Funds, etc.)

Business Interests

## Existing Estate Planning Documents

Wills (Country and Date)

Trusts (Country, Type, Date)

Powers of Attorney

## Beneficiaries & Special Requests

Primary Beneficiaries

Contingent Beneficiaries

Special Requests / Notes