

# Real Estate Investor Estate Planning Questionnaire

## Personal Information

Full Name

Date of Birth

SSN

Address

Email

Phone Number

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## Marital & Family Information

Marital Status

Spouse Name

Children (Names & Ages)

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## Real Estate Holdings

Number of Properties Owned

Properties Details (Address, value, ownership structure, etc.)

How are your properties held?

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## Business Interests

Business Entities (names, type, ownership %)

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## Estate Planning

Do you already have any estate planning documents?

Preferred Executor/Trustee

Primary Beneficiaries (names & relationship)

Guardians for minor children

Special Instructions / Requests

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## Additional Notes

Other Information

