

Single Parent Estate Planning Questionnaire

Personal Information

Full Name

Date of Birth

Address

Phone Number

Email

Children's Information

Child 1

Name

Date of Birth

Child 2

Name

Date of Birth

Guardian Information

Guardian Name

Relationship to Child(ren)

Assets

Real Estate

Bank Accounts

Investments

Other Assets

Debts & Obligations

Mortgage

Loans

Beneficiaries

Primary Beneficiary(ies)

Contingent Beneficiary(ies)

Specific Requests / Notes

Special Instructions or Requests