

# Decedent Financial Information Questionnaire

## The Wright Firm

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### **Instructions:**

How we can help you very much depends on the nature of the assets and liabilities involved. For example, a will only controls a decedent's individually owned and tenant in common property interests. Trusts only control property titled to the trustee. Jointly owned property with a right of survivorship will pass to the survivor regardless of what an individual's will or trust provides. Life insurance, qualified plans and IRAs, and annuities generally pass at death by virtue of the owner's beneficiary designation. As such, it is important that we obtain a good understanding as to how you owned his or her property at death.

Please complete this Financial Information Questionnaire as completely and as legibly as possible. If you are using Adobe Acrobat on your computer to fill in your answers, the questionnaire contains a number of "drop-down boxes" that give you choices to save typing. If you see a little box at the right edge of an entry, use your mouse to click on the box, and you will be presented with a number of typical choices. If these choices do not allow you to provide correct information, feel free to type the correct information into the box on your own. Also, to save you time and typing, we use a convention that if an entry is blank but the rest of the line is completed, the blank box means "Same as above". Consequently, if you complete a line but don't know the answer to an information item, please enter a " ? " in the appropriate box.

Thus, in the following example,

	Owner(s)	
1	Decedent	sdf ghj rtyu
2	Same Owner(s) as Above	sdf ghj rtyu
3		sdf ghj rtyu
4	?	sdf ghj rtyu

the answers in Lines 1 and 2 both mean the same thing and point to "Decedent" in Line 1, and the Owner in Line 4 is unknown but possibly was the Decedent.

If we haven't supplied enough entry lines for the Decedent's particular assets, feel free to use the "Anything Else of Value" entries at the end or a blank sheet of paper.

Finally, if you are answering with reference to the Decedent and another person or persons, it is important that we know exactly who you are referring to. Please therefore identify "Individual 1" and "Individual 2" below:

Decedent refers to: \_\_\_\_\_

Individual 1 refers to: \_\_\_\_\_

Individual 2 (if any) refers to: \_\_\_\_\_



**REAL ESTATE:**

Owner(s)	Address	County Where Deed Recorded	Mortgage or Deed of Trust Balance	Date of Death Value

**CLOSELY HELD BUSINESS INTERESTS:**

Owner(s)	Type of Business	Company Name	Buy-Sell Agreement?	Percent Owned	Date of Death Value
			Yes No		
			Yes No		
			Yes No		

**MONIES OWED TO THE DECEDENT (E.G., PROMISSORY NOTES, MORTGAGES, OTHER OBLIGATIONS BY OTHERS):**

Debtor(s)	Owed to	Type of Obligation	Original Obligation Date	Interest Rate	Original Obligation Amount	Amount Owed on Date of Death

**IRA / 401(k) / PENSION / OTHER RETIREMENT ACCOUNTS:**

Owner(s)	Type of Account IRA, Roth IRA, 401(k), TSP, Pension, Other	Custodian / Company	Account Number	Beneficiaries	Date of Death Value
				Primary: Contingent:	
				Primary: Contingent:	
				Primary: Contingent:	
				Primary: Contingent:	
				Primary: Contingent:	

**ANNUITIES:**

Owner(s)	Type of Annuity Variable or Fixed	Issuing Company	Account Number	Beneficiaries	Date of Death Value
				Primary: Contingent:	
				Primary: Contingent:	
				Primary: Contingent:	

**LIFE INSURANCE POLICIES:**

Owner(s)	Insured	Insurance Company	Policy Number	Beneficiaries	Type of Insurance	Death Benefit
				Primary: Contingent:	Permanent: <input type="checkbox"/> Term: <input type="checkbox"/>	
				Primary: Contingent:	Permanent: <input type="checkbox"/> Term: <input type="checkbox"/>	
				Primary: Contingent:	Permanent: <input type="checkbox"/> Term: <input type="checkbox"/>	
				Primary: Contingent:	Permanent: <input type="checkbox"/> Term: <input type="checkbox"/>	
				Primary: Contingent:	Permanent: <input type="checkbox"/> Term: <input type="checkbox"/>	

**PERSONAL PROPERTY:**

Please provide estimated total date of death values of all personal property that has significant value. Do not include clothing.

Household Furnishings	Antiques	Collections	Jewelry	Other

**MOTOR VEHICLES AND BOATS:**

Owner(s)	Year	Make	Model	Remaining Lien Amount (if any)	Estimated Value

**ANYTHING ELSE OF VALUE AT DECEDENT'S DEATH:**

(for example: oil, gas, and mineral interests; royalties and patents; copyrights; other types of investments; and items you couldn't fit in above)

Owner(s)	Type of Property / Interest % Share	Description & Property Location	Date of Death Value

