



# STEIN SPERLING

Resource Center

## Estate Planning Questionnaire

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**Practice Areas:**[Estates + Trusts](#)

**Tags:**[will](#) [estate planning](#) [retirement plans](#)

Stein Sperling's Estate Planning Questionnaire assists our attorneys in developing recommendations for customized estate plans which reflect each client's unique circumstance. The questionnaire collects valuable data such as contact information, financial figures (including retirement accounts, non-retirement assets, insurance, liabilities and annuities) and designation of fiduciaries (including powers of attorney, advance medical directive, personal representatives and trustees).

By completing this questionnaire you will help our attorneys to build a solid foundation for your estate plan. To the extent possible, all clients should complete this questionnaire; however, only one questionnaire needs to be completed for a married couple. While estimates or approximate values are acceptable, please take the necessary time to complete the questionnaire diligently, accurately and in full. We find it most helpful to receive completed questionnaires, at least with respect to the financial information, prior to our initial meeting with clients.

Fill out the [Estate Planning Questionnaire online](#).

Or, download and print a copy of the [Estate Planning Questionnaire](#) to fill out manually.