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ESTATE PLANNING QUESTIONNAIRE

This document is to be used by Thomas D. Kilpatrick for estate planning purposes.
Each person should complete a separate estate planning questionnaire.

Personal Profile

Signature: _____

Date Completed: _____

Names

Client:

_____	_____	_____	_____
First	Middle	Last	Date of birth
_____	_____	_____	_____
Street Address	City	State	Zip
_____	_____	_____	_____
Home phone	Work phone	Cell phone	

e-mail: _____

What is the best way to reach you? _____

Spouse, if any:

_____	_____	_____	_____
First	Middle	Last	Date of birth
_____	_____	_____	_____
Street Address	City	State	Zip
_____	_____	_____	_____
Home phone	Work phone	Cell phone	

e-mail: _____

Children				
Name	Address	Date of Birth	Marital Status	Child of Husband, Wife or both

Do either of you, your spouse, or your children have any special health or disability concerns? If yes, please briefly explain:

Parents

Address

If deceased, date of death.

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<hr/>	<hr/>	<hr/>

Siblings

Address

If deceased, date of death

<hr/>	<hr/>	<hr/>
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WILL

Whom do you want to receive your assets at your death?

If the people listed above predecease you, who would you like to receive your assets?

Whom do you want to name as Personal Representative in your Will?

Name: _____

Address: _____

Whom do you want to name as a successor Personal Representative if your primary Personal Representative cannot serve?

Name: _____

Address: _____

Whom do you want to appoint as guardian for your minor children?

Name: _____

Address: _____

Alternate Agent:

Name: _____

Address: _____

Power of Attorney

Whom do you want to appoint as your agent?

Name: _____

Address: _____

Home Phone: _____

Work Phone: _____

Mobile Phone: _____

Whom do you want to appoint as first alternate to your agent if your primary agent cannot serve?

Name: _____

Address: _____

Home Phone: _____

Work Phone: _____

Mobile Phone: _____

Whom do you want to appoint as second alternate to your agent if your primary agent cannot serve?

Name: _____

Address: _____

Home Phone: _____

Work Phone: _____

Mobile Phone: _____

US Citizenship

Are you an US Citizen? Is your spouse an US Citizen? _____

Are you a veteran? _____

County of Residence

Have you ever lived in a community property state as a married adult? (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington and Wisconsin) _____

Have you established any trusts during your lifetime? If so, please furnish a copy of document and assets owned by trust?

Do you expect to receive any inheritances? From Whom? _____

Do you have any special concerns or things you would like to accomplish with your estate planning? _____

Have you or your spouse ever utilized assisted reproductive technology (ART) in an effort to have children or are you considering doing so? _____

Have you or your spouse ever donated eggs or sperm to another individual or couple with the understanding that you would not be the legal parent of any resulting children: _____

Health Care Power of Attorney

Is there someone with whom you would be comfortable making health care decisions for you if you were unable to make them yourself?

Name: _____

Address: _____

Home Phone: _____

Work Phone: _____

Mobile Phone: _____

E-Mail: _____

Whom do you want to appoint as your alternate agent if your primary agent cannot serve?

Name: _____

Address: _____

Home Phone: _____

Work Phone: _____

Mobile Phone: _____

E-Mail: _____

Whom do you want to appoint as second alternate to our agent if your alternate agent cannot serve?

Name: _____

Address: _____

Home Phone: _____

Work Phone: _____

Mobile Phone: _____

E-Mail: _____

Are there any special provisions you want in your health care power of attorney?

If you were dying, would you want to be kept artificially alive by medical means? Would you want to be fed with feeding tubes if you were dying? Would you want to be fed with feeding tubes if you were in a persistent vegetative state?

Living Will

Do you want to execute a living will?

yes _____ no _____

Note: If you are comfortable with your health care agent making end of life decisions, you may not want a living will. If you sign both documents, the living will takes precedence over the health care power of attorney for end of life decisions, and the decision is made by two doctors, not your agent.

Trust - Are you interested in establishing a trust? There are several reasons you may need a trust: to save estate tax, manage assets for minors, disabled individuals and spendthrifts, protect assets of claims from creditors, spouses or future spouses, and to avoid probate.

What do you want this trust to accomplish? _____

Whom do you want to name as your Trustee?

Whom do you want to appoint as your Successor Trustee if your primary Trustee cannot serve? _____

Assets and Liabilities

Probate Assets

Real Estate address, TMS number, or description including the county	How is it titled	Fair Market Value
_____	_____	_____
_____	_____	_____
_____	_____	_____

Bank accounts Institution and type of account	How is it titled	Balance
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
Brokerage Accounts , Stocks, and Bonds (Do not list retirement accounts and IRA here)	How is it titled	Current Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Interests in closely held business	How Is it owned	Current fair market Value
Include form of business, i.e., LLC, LLP, sole proprietorship		
_____	_____	_____
_____	_____	_____
_____	_____	_____
Notes and Loans	Terms of loan-Who is to receive the money when paid?	Amount owed to you
Receivable -Does anyone owe you money? Who?		
_____	_____	_____
_____	_____	_____
_____	_____	_____
Personal Property -Cars, Antiques, Jewelry (Value greater than \$10,000)	Owner	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Mortgage and liens - Property Secured	Date will be paid in full	Current Balance
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

NonProbate Assets

Life Insurance—Insurance company	Insured	Owner of policy	Beneficiary of Policy	Amount payable at death
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
Retirement Accounts	Owner	Beneficiary	Annual contributions or distributions	Current Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Have you given any assets with a value greater than the annual gift tax exclusion amount during your life?	When	To Whom	Property given	Value of gift
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Normally, I bill for my services as attorney on an hourly basis. My current rate is \$165 per hour. My assistant also bills at an hourly rate. I prepare the estate planning documents, and she proofs them, copies them, and mails them to the clients. You will be mailed any proposed document and given a chance to review it. I will be happy to explain the legal and tax ramifications of any estate planning document that we prepare to you.

Any information which you give to me is confidential. However, if someone else accompanies you to your estate planning, there is no confidentiality as to that person.

The way that your assets are titled is important. I have asked for the financial information to determine if you need planning to avoid probate, and if your assets will actually be distributed as you want at your death. Joint accounts belong to the joint tenant at your death. They do not pass under your will. Likewise, assets that pass by contract, like life insurance, are not distributed pursuant to your will.

For married couples: Spouses can have differing, and sometimes conflicting, interests and objectives regarding their estate planning. For example, they may have different views on how property should pass after the death of one or both of them. In some situations, I may recommend that holdings be restructured to take advantage of available tax benefits, which may involve gifts from one spouse to the other. Each couple's situation is unique.

If you each had a separate lawyer, you would each have an "advocate" for your position and would receive totally independent advice. Information given to your own lawyer is confidential and cannot be obtained by your spouse without your consent. That is not the case when one attorney (or one firm) advises both of you. I cannot be an advocate for one of you against the other. If I represent both of you, information that either of you gives to me relating to your planning cannot be kept from the other. If you ask me to continue to serve you jointly, my effort

will be to assist in developing a coordinated overall plan and to encourage the resolution of differing interests in an equitable manner and in the best interest of your marriage.

After considering these factors, each of you must decide whether you wish for me to represent you jointly in connection with your estate planning and related matters. However, if that is not the case or if at any time either of you wishes to have the advice of separate counsel, you are completely free to do so.

If at any time you are unhappy with our services, you may terminate our representation. We will expect you to pay for the work already performed. You are also entitled to your file; however, we will charge \$0.50 per page to copy the file. It is imperative that we retain a copy of your file. I sincerely hope that you are satisfied with our representation, and I ask that you let me know if I, or anyone else in our office, does not meet your expectations.

It is helpful if you will complete this questionnaire before our conference. However, I will not actually prepare documents until we meet and I feel I have a good understanding of what you need and what you want to accomplish.