

Strategic Tax Planning, LLC

Tax Consulting · Tax Preparation · Trust Services · Asset Protection

**CLIENT QUESTIONNAIRE
REVOCABLE LIVING TRUST
(Married Couple - Separate Disposition Plan - Blended Family)**

PLEASE PRINT ALL ANSWERS

1. What name would you like your trust to have? We recommend "THE (YOUR LAST NAME) REVOCABLE LIVING TRUST"; you may choose any name:

2. Husband's name (as he would like it to appear in legal documents), Social Security Number and Date of Birth:

Name	SSN:	DOB:
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3. Wife's name (as she would like it to appear in legal documents), Social Security Number and Date of Birth:

Name	SSN:	DOB:
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4. Address:

Street Address

City	State	Zip	County
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5. Phone (Days): _____
- (Evenings): _____

6. Where will documents be signed?

State: _____ County: _____

NOTE: Employees of Strategic Tax Planning LLC are not lawyers, are not employed by a lawyer, cannot give legal advice, and communications with us are not privileged.

Providing Financial Solutions

8801 W. Union Hills Drive, Building C, Peoria, Arizona 85382
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7. How much control do you want the surviving spouse to have over the trust:
(Sample options - you may select your own option - describe below)

Option 1: (Maximum Control)

_____ Maximum control consistent with creditor protection and tax avoidance provided by trust. (Includes the right to re-name the final trust beneficiaries). ***This option gives the surviving spouse the authority to re-write the trust as to how it will be disposed of upon his/her death; it is the same as a joint tenancy title.***

Option 2: (Medium Control)

_____ All income; use of principal to maintain standard of living; little or no accountability to final heirs. ***This option gives the surviving spouse a great deal of control as to how assets are managed and spent during his/her lifetime; however, the deceased spouse's assets must go to his/her heirs when the surviving spouse dies; the surviving spouse may change the percentage among the heirs, excluding any one or more.***

Option 3: (Limited Control)

_____ All income; use of principal to maintain standard of living; accountability to final heirs. ***This option gives the surviving spouse a great deal of control as to how assets are managed and spent during his/her lifetime; however, the surviving spouse is legally accountable to the final heirs for following the terms of the trust.***

Other:

Husband's Estate

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8. Persons who should inherit husband's assets after both spouses are deceased:

Name	Relationship*	Date of Birth	If Heir Doesn't Survive	%
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____

(Use other side for more names; must total 100%)

*Relationship: if heir is a son or daughter select:
 H = husband's child, W = wife's child, J = joint child

- 1 = if heir doesn't survive, to his/her own children, if any, otherwise pro rata to other beneficiaries.
- 2 = if heir doesn't survive, to his/her spouse, if any, otherwise pro rata to other beneficiaries.
- 3 = if heir doesn't survive, to his or her children, if any, otherwise to his or her spouse, if any, otherwise pro rata to other beneficiaries.
- 4 = if heir doesn't survive, to his or her spouse, if any, otherwise to his or her children, if any, otherwise pro rata to other beneficiaries.
- 5 = if heir doesn't survive, pro rata to other beneficiaries and NOT to the heir's spouse or children.

NOTE: If none of options 1-5 apply, please describe the appropriate succession (if heir doesn't survive) under No. 20 "Custom Drafting Instructions".

9. Person(s) who should inherit the husband's assets if **ALL PERSONS** in no. 8 above are deceased:

Name	Relationship	Date of Birth	If Heir Doesn't Survive	%
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____

(Use other side for more names; must total 100%)

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Wife's Estate

10. Persons who should inherit wife's assets after both spouses are deceased:

Name	Relationship*	Date of Birth	If Heir Doesn't Survive	%
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____

(Use other side for more names; must total 100%)

*Relationship: if heir is a son or daughter select:
H = husband's child, W = wife's child, J = joint child

- 1 = if heir doesn't survive, to his/her own children, if any, otherwise pro rata to other beneficiaries.
- 2 = if heir doesn't survive, to his/her spouse, if any, otherwise pro rata to other beneficiaries.
- 3 = if heir doesn't survive, to his or her children, if any, otherwise to his or her spouse, if any, otherwise pro rata to other beneficiaries.
- 4 = if heir doesn't survive, to his or her spouse, if any, otherwise to his or her children, if any, otherwise pro rata to other beneficiaries.
- 5 = if heir doesn't survive, pro rata to other beneficiaries and NOT to the heir's spouse or children.

NOTE: If none of options 1-5 apply, please describe the appropriate succession (if heir doesn't survive) under No. 20 "Custom Drafting Instructions".

11. Person(s) who should inherit the wife's assets if **ALL PERSONS** in no. 10 above are deceased:
(Only list person who will not inherit under question 10)

Name	Relationship	Date of Birth	If Heir Doesn't Survive	%
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____
_____		_____	1 2 3 4 5	_____

(Use other side for more names; must total 100%)

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12. Postponement of possession - for young or financially unsophisticated heirs: **Funds will be available before distribution age(s) for education, health care, support and maintenance.**

(Four (4) sample options; if you choose one, fill-in age(s); you may describe a different option under "Custom Instructions" below). If husband and wife want different disposition plans, please put a "H" or "W" by the choice of each one.

Option 1:

_____ Give control of inheritances after age _____ (default = 25).

Option 2:

_____ Supplemental monthly income of \$ _____ until age _____ (suggested minimum: age 40) then distribute in full.

Option 3:

_____ Give control of inheritances in stages:
Four (4) options; Choose one (1) and fill-in ages(s)

Option a: 1/10 of total inheritance at age _____
2/10 more at age _____
3/10 more at age _____
4/10 (balance) at age _____
(Default = 25, 28, 31 and 34)

Option b: 1/3 at age _____
1/3 at age _____
1/3 at age _____

Option c: 1/4 at age _____
1/4 at age _____
1/4 at age _____
1/4 at age _____

Option d: 1/2 at age _____
1/2 at age _____

Option 4:

_____ Distribute in ten annual installments beginning at age _____.

13. (a) Who should serve as successor trustee, if **neither** spouse can serve?

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First Choice: _____

Second Choice: _____

Third Choice: _____

Who should direct investments, if other than successor trustee? **(This is a non-binding recommendation for the Trustee).**

(b) Who should serve as trustee for husband's heirs (until they reach the "control" age)?

First Choice: _____

Second Choice: _____

Third Choice: _____

(c) Who should serve as trustee for wife's heirs (until they reach the "control" age)?

First Choice: _____

Second Choice: _____

Third Choice: _____

Note: You may list more than one person in the same order of priority to serve as co-trustees; if one can't serve, the other(s) will serve. The person(s) in the next order of priority won't serve unless all of the persons in the higher priority are unavailable.

14. Who should make your **health care** decisions if **neither** of you are mentally competent?

Husband: _____ **Wife:** _____
First Choice: _____

Second Choice: _____

Third Choice: _____

15. Who should act as Guardian of any minor child(ren)?

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Husband:

Wife:

First Choice: _____

Second Choice: _____

Third Choice: _____

16. Do you want a living will?

Husband: Yes _____

No _____

Wife: Yes _____

No _____

17. Do you want to be cremated?

Husband: Yes _____

No _____

Wife: Yes _____

No _____

18. Do you wish to donate your organs for transplant?

Husband: Yes _____

No _____

Wife: Yes _____

No _____

19. Do you want a Mental Health Care Power of Attorney?

Husband: Yes _____

No _____

Wife: Yes _____

No _____

20. Approximate net worth: joint- \$ _____;

Husband: \$ _____; Wife: \$ _____.

Life insurance (total death benefit) Husband: \$ _____

Wife: \$ _____

REGARDING ARIZONA TRUSTS ONLY:

20. When one spouse dies, should the trustee (usually, the surviving spouse) be required to notify the final heirs of their rights under the trust? **Yes or No**

21. Who should resolve a dispute between the trustee and a trust beneficiary? (The decision is non-binding; both parties have to agree to accept this person's decision):

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22. Custom Drafting Instructions (describe any personal desires of either spouse which do not fit within the general questions above):

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Heirs (anyone who will receive a distribution) and successor trustees
(persons who will run the trust):

- a) Name: _____
Nickname: _____
Address: _____
Phone: _____ Date of Birth: _____
SSN: _____ Relationship: _____
- b) Name: _____
Nickname: _____
Address: _____
Phone: _____ Date of Birth: _____
SSN: _____ Relationship: _____
- c) Name: _____
Nickname: _____
Address: _____
Phone: _____ Date of Birth: _____
SSN: _____ Relationship: _____
- d) Name: _____
Nickname: _____
Address: _____
Phone: _____ Date of Birth: _____
SSN: _____ Relationship: _____

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e) Name: _____
Nickname: _____
Address: _____
Phone: _____ Date of Birth: _____
SSN: _____ Relationship: _____

f) Name: _____
Nickname: _____
Address: _____
Phone: _____ Date of Birth: _____
SSN: _____ Relationship: _____

g) Name: _____
Nickname: _____
Address: _____
Phone: _____ Date of Birth: _____
SSN: _____ Relationship: _____

h) Name: _____
Nickname: _____
Address: _____
Phone: _____ Date of Birth: _____
SSN: _____ Relationship: _____

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