

*Law Offices Gary Oberst
A Professional Corporation*

111 East Avenue - Norwalk, CT 06851
Phone: (203) 866-4646 - Fax: (203) 852-1574 - E-Mail: info@oberstlaw.com

Gary Oberst
Admitted in CT, NY, NJ, PA & DC

Sharon Oberst DeFala
Admitted in CT, NY & OR

Patricia C. Moran
Admitted in CT, NY & MA

ESTATE PLANNING QUESTIONNAIRE

FULL LEGAL NAME _____

FORMER (MAIDEN) NAMES OR ALIASES _____

CURRENT ADDRESS _____

PHONE _____ BUSINESS _____ CELL _____

DATE OF BIRTH _____ SSN ____ - ____ - _____

MARITAL STATUS _____ SPOUSE'S NAME _____

IS THERE A PRE-NUPTIAL AGREEMENT? Y / N IF YES, PLEASE PROVIDE

IS THERE A PRIOR MARRIAGE? Y / N
IF YES, NAME OF PRIOR SPOUSE _____

IS THERE A SETTLEMENT AGREEMENT? Y / N IF YES, PLEASE PROVIDE

DO YOU HAVE A PRIOR WILL? Y / N IF YES, PLEASE PROVIDE

LIST YOUR CHILDREN:

| NAME | BIRTH DATE | MARITAL STATUS | OTHER PARENT |
|------|------------|----------------|--------------|
|------|------------|----------------|--------------|

1. _____

2. _____

3. _____

ARE YOU EXPECTING A CHILD? Y / N

In order to protect your privacy, please send this form via facsimile.

Law Offices Gary Oberst
A Professional Corporation

111 East Avenue - Norwalk, CT 06851
Phone: (203) 866-4646 - Fax: (203) 852-1574 - E-Mail: info@oberstlaw.com

ESTIMATED GROSS ESTATE (ASSETS MINUS LIABILITIES) \$ _____

BULK OF YOUR ESTATE GOES TO (e.g., SPOUSE) _____

IF S/ HE PREDECEASES YOU, THEN TO (e.g., CHILDREN) _____

WHO DO YOU WANT AS EXECUTOR (PERSON RESPONSIBLE TO CARRY OUT YOUR WISHES)?

NAME _____ **RELATIONSHIP** _____

CITY & STATE _____

WHO DO YOU WANT AS A TRUSTEE (PERSON IN CHARGE OF TRUST FUNDS)?

NAME _____ **RELATIONSHIP** _____

CITY AND STATE _____

WHO DO YOU WANT AS A GUARDIAN (PERSON TO CARE FOR CHILDREN)?

NAME _____ **RELATIONSHIP** _____

CITY AND STATE _____

WHO DO YOU WANT AS HEALTH CARE AGENT (PERSON TO MAKE DECISIONS FOR YOU IF YOU ARE INCAPACITATED)?

NAME _____ **RELATIONSHIP** _____

CITY AND STATE _____

DO YOU WANT A LIVING WILL? Y / N

In order to protect your privacy, please send this form via facsimile.

Law Offices Gary Oberst
A Professional Corporation

111 East Avenue - Norwalk, CT 06851
Phone: (203) 866-4646 - Fax: (203) 852-1574 - E-Mail: info@oberstlaw.com

IF YOU HAVE ANY QUESTIONS OR DIFFICULTIES IN COMPLETING THIS FORM,
PLEASE CALL (203) 866-4646.

PLEASE RETURN TO:

LAW OFFICES OF GARY OBERST, P.C.
111 EAST AVENUE
NORWALK, CT 06851

In order to protect your privacy, please send this form via facsimile.