



ST. GABRIEL OF THE SORROWFUL MOTHER CHURCH

ESTATE PLANNING QUESTIONNAIRE

O'Donnell, Weiss & Mattei, P.C.

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Your full name: _____

Spouse's name: _____

Address: _____

City: _____ State: _____ Zip: _____ County: _____

Phone: Home: _____ Cell: _____ Preference: _____

Email address (husband): _____ (wife): _____

Marital status (please check one): [] single [] engaged [] married [] divorced [] widowed

Date of birth (husband): _____ (wife): _____

Number of children: _____ Number of children from previous marriage: _____

Children's full name(s): _____ Date(s) of birth: _____

Four sets of horizontal lines for listing children's names and birth dates.

How many grandchildren do you have? _____

Do you own your home? [] Yes [] No If yes, approximate market value: \$ _____

Remaining mortgage amount: \$ _____

Your approximate net worth (total assets minus mortgage/car payments/credit card debt): \$ _____

Generally, in most cases, houses are owned jointly as husband and wife.

Is that the case with you and your spouse? Yes No

If no, why not? _____

Specific Bequest(s):

Do you plan to include a monetary gift to St. Gabriel of the Sorrowful Mother? Yes No

Specific amount of bequest: \$ _____

OR:

Percentage of net estate: 3% 4% 5% 10% _____% (other)

Residue:

Thereafter, do you want everything to go to your children, in equal shares? Yes No

If no, please explain: _____

A Trust is required for children under the age of 18, at what ages do you want them to receive distributions? 21, 25 & 30? Other: _____

If a child predeceases you, do you want their share to go to their children, in equal shares, or to their surviving sibling(s)?

Executor/Executrix:

Who do you want to administer your estate after you die?

Name: _____ Relationship: _____

Address: _____

Alternate name: _____ Relationship: _____

Address: _____

Guardian:

Who should be named as Guardian for any minors under the age of 18? N/A

Name: _____ Relationship: _____

Address: _____

Alternate name: _____ Relationship: _____

Address: _____

Trustee:

Who should manage the children's finances? N/A

Name: _____ Relationship: _____

Address: _____

Alternate name: _____ Relationship: _____

Address: _____