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**CONFIDENTIAL ESTATE-PLANNING QUESTIONNAIRE**

Your completion of this questionnaire will help us prepare the necessary documents to implement an estate plan appropriate to your circumstances. Please complete this questionnaire as thoroughly as possible without doing extensive research. Skip any questions that do not apply to you. Your answers will remain completely confidential.

Your name as you want it to appear in legal documents:		Spouse's name as s/he wants it to appear in legal documents:	
Home address (include street address even if you have a P.O. box):		Home telephone:	
		Your work telephone:	
		Spouse's work telephone:	
City, State:	ZIP:	Other contact information (cell phone, fax, email, etc.):	
Your date of birth:		Spouse's date of birth:	
Your place of birth:		Spouse's place of birth:	
Your Social Security number:		Spouse's Social Security number:	

CHILDREN – NATURAL AND/OR ADOPTED			
Full legal name	Date of birth	Place of Birth	Natural or adopted
			<input type="checkbox"/> Natural <input type="checkbox"/> Adopted
			<input type="checkbox"/> Natural <input type="checkbox"/> Adopted
			<input type="checkbox"/> Natural <input type="checkbox"/> Adopted
			<input type="checkbox"/> Natural <input type="checkbox"/> Adopted
			<input type="checkbox"/> Natural <input type="checkbox"/> Adopted
			<input type="checkbox"/> Natural <input type="checkbox"/> Adopted
			<input type="checkbox"/> Natural <input type="checkbox"/> Adopted

Note: If space above is insufficient to list all children, check here  and continue list on the reverse side of this page

**PERSONAL REPRESENTATIVE (EXECUTOR)**

The personal representative of an estate (formerly known as an "executor") is the person who is responsible for administering the probate of an estate, which involves collecting assets, paying claims, and ultimately distributing property to the intended beneficiaries. At least one personal representative must be named, but we recommend naming at least one alternate in case the first choice is not available. Usually a spouse will be the first choice. A personal representative must be at least 18 years old, but does not have to be a Missouri resident. Family members are usually chosen, but friends or bank trust departments also can be named.

**Your choices for personal representative, listed in order of preference**

Name	Relationship to you	City and state of residence
1.		
2.		
3.		
4.		

**Your spouse's choices for personal representative, listed in order of preference**

Name	Relationship to your spouse	City and state of residence
1.		
2.		
3.		
4.		

Your will may fix the compensation of the personal representative. In the absence of such a fee provision, a personal representative's compensation is set by statute (§473.153 RSMo.) based on the value of the personal property in the estate plus the proceeds of any real estate sold under court order. The statutory commission scale is as follows: On the first \$5,000, 5%; on the next \$20,000, 4%; on the next \$75,000, 3%; on the next \$300,000, 2 3/4%; on the next \$600,000, 2 1/2%; and on all over \$1,000,000, 2%. The vast majority of wills do not contain a fee provision and thus accept the statutory compensation scheme. **However, if you do not want to use the statutory compensation scheme, check here  and write your alternative scheme on the reverse side of this page.** Keep in mind that personal representatives – particularly spouses and other family members – often waive compensation altogether, although you cannot require this in your will.

**GUARDIAN/CONSERVATOR**

If both you and your spouse die at or near the same time and leave minor children (under age 18), the Probate Court will need to appoint a guardian and/or conservator for your children. A guardian has physical custody of a child. A conservator manages property owned by the child. You can nominate appropriate persons to serve in this role. We suggest naming at least one alternate. Each person named must be at least 18 years old, but does not have to be a Missouri resident. Use the space below to specify your choices for guardian/conservator in order of preference.

**Your and your spouse's choices for guardian/conservator, listed in order of preference**

Name	Relationship to you and your spouse	City and state of residence
1.		
2.		
3.		
4.		

**TRUSTEE**

If both you and your spouse die at or near the same time and have children who may be too young or otherwise unable to handle money and property, your estate plan should establish a trust, managed by a trustee you select, to handle money and property until your children are old enough or otherwise able to manage their own affairs. Use the space below to designate at least one trustee; we suggest naming at least one alternate. Each person named must be at least 18 years old, but does not have to be a Missouri resident. You can also name a bank trust department as trustee.

**Your and your spouse's choices for trustee, listed in order of preference**

Name	Relationship to you and your spouse	City and state of residence
1.		
2.		
3.		
4.		

If your child(ren) are not incompetent, state the age at which the trustee should distribute all remaining money/property to your child(ren):

**SEPARATE WRITTEN LIST**

Under Missouri law you can put a clause in your will which will permit you to give items of tangible personal property to specified beneficiaries by filling out a separate written list. You cannot use this procedure unless the appropriate clause is placed in your will, but you are not obligated to use the procedure if the clause is included. The separate written list can be changed from time to time without revising your will. We recommend that you take advantage of this procedure, and we will provide you with the necessary form and instructions to prepare a valid separate written list if you decide to do so. Check here  if you want to authorize a separate written list. Check here  if your spouse wants to authorize a separate written list.

**INDEPENDENT ADMINISTRATION**

Your will can authorize your personal representative to administer your estate "independently," which means that your personal representative would not need to seek Probate Court approval for routine transactions. This simplifies estate administration and can make it less expensive. We recommend authorizing independent administration if you believe the persons you have named as possible personal representatives of your estate are trustworthy and efficient. Check here  if you want to authorize independent administration. Check here  if your spouse wants to authorize independent administration.

**BOND**

Unless your will waives bond, your personal representative will be required to post a bond with the Probate Court to guarantee faithful performance of financial duties. The cost of the bond will be paid out of your estate. We recommend waiving a bond if you believe the persons you have selected as personal representatives are trustworthy. Check here  if you wish to waive bond for all persons named as personal representatives. Check here  if you do not wish to waive bond for any person named as personal representative. Check here  if you wish that only some of those named as personal representatives be required to post bond and list their names:

**ESTATE TAX**

Federal law imposes an estate tax on estates over a certain size, except that there is a 100% exemption from estate tax for all money and property passing to a surviving spouse. All money and property that passes to any person(s) as a result of a death is counted for the purpose of determining whether estate tax is owed, whether or not the money or property passes through a probate proceeding – for example, life insurance proceeds are included in an estate for estate tax purposes even though they do not ordinarily pass through probate. As of 2019 an estate is exempt from estate tax if the total of all money and property passing to any person(s) as a result of death does not exceed \$11,000,000. Your estate plan can be set up to minimize or eliminate estate tax if your assets would exceed the limit. **If you believe your total assets may exceed \$11,000,000, please fill out the following asset schedule so we can evaluate whether it may be necessary to incorporate estate-tax planning in your estate plan.**

Present value of all real estate owned, less loans thereon. . . . .	\$
Present value of motor vehicles owned, less loans thereon. . . . .	\$
Present value of all household goods, less loans thereon. . . . .	\$
Present value of all personal items (clothing, jewelry, cameras, etc.), less loans thereon. . . . .	\$
Present value of all accounts at banks, S&Ls, credit unions, etc. . . . .	\$
Present value of stocks, bonds, mutual funds, other investments. . . . .	\$
Life insurance benefits payable upon your death. . . . .	\$
Life insurance benefits payable upon your spouse's death. . . . .	\$
Present value of any retirement benefits you may have which can be assigned to others upon death. . . . .	\$
Present value of any retirement benefits your spouse may have which can be assigned to others upon death. . . . .	\$
Present value of all other assets of any kind not included above. . . . .	\$
Present total of all liabilities not deducted from particular asset listings above. . . . .	\$( )
<b>TOTAL NET ASSETS. . . . .</b>	<b>\$</b>

**FORGIVING DEBTS OWED TO YOU**

In your estate-planning documents, you can forgive particular debts that may be owed to you, such as loans to children. If you desire to do so, use the space below to list the debts to be forgiven, including the names of the obligors and the nature and amount of the debt:

**“DISINHERITING” PARTICULAR PERSONS**

If there are particular persons who might be your heirs at law and who you do not want to receive anything from your estate under any circumstances, list those persons here and briefly state why you do not want them to receive anything:

**HEALTH CARE DIRECTIVE AND DURABLE POWER OF ATTORNEY FOR HEALTH CARE**

If you desire, we will prepare a Health Care Directive and Durable Power of Attorney for Health Care at no additional charge as part of your estate-planning process. Check here  if you want this document prepared. Check here  if your spouse wants this document prepared.

**DISTRIBUTION OF PROPERTY**

For a husband and wife with a child or children, the most common scheme of distribution is to give everything to the surviving spouse (on the assumption that he or she will provide for the children), and to give everything to the children in equal shares if both spouses die at or near the same time (with the children’s shares going into trust if any of them are under the age you specify or are incompetent). Check here  if you want to use this plan of distribution.

If you want to give particular property or money to particular individuals, charities, etc., you can do so either in addition to or instead of the foregoing scheme of distribution. Items of tangible personal property (except automobiles) can be given by using the Separate Written List mentioned above. Use the space below to specify your plan of distribution of particular property or money that will not be included in a Separate Written List:

<u>RECIPIENT</u>	<u>RELATIONSHIP TO YOU OR YOUR SPOUSE</u>	<u>DESCRIPTION OF PROPERTY OR MONEY</u>
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If you have not elected to have all property go to your spouse and children, you should also specify the recipient(s) of the “residue” of your estate – that is, everything left over in your estate after the specific gifts you have made. Use the space below to specify the recipient(s) of the residue, including his/her/their relationship to you and your spouse:

If you have any additional comments or questions about the distribution of your property, or if the space provided above was insufficient, check here  and write your comments, questions or additional distribution information on the back of this sheet.

<b>Your signature:</b>	<b>Date:</b>	<b>Your spouse’s signature:</b>	<b>Date:</b>
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