



## LAW OFFICES OF NAOMI T. STAL

Helping you navigate every step of your life

### ESTATE PLANNING QUESTIONNAIRE

Congratulations on taking the next step towards securing your future! The goal of this document is to HELP you start the process of planning your future. Start by answering these questions:

- Are you married? (circle) YES NO
- Have been married before? (circle) YES NO
- Are you disabled? (circle) YES NO
- Are you a US citizen? (circle) YES NO
- Do you have children? (circle) YES NO
- Any children under 18? (circle) YES NO
- Any children have special needs? (circle) YES NO
- Do you have a Will? (circle) YES NO
- Do you have a Trust? (circle) YES NO
- Do you own a home? (circle) YES NO
- Do you have an accountant? (circle) YES NO If yes, NAME & No.#: \_\_\_\_\_
- Do you have a financial planner? (circle) YES NO If yes, NAME & No.#: \_\_\_\_\_
- Do you have a personal lawyer? (circle) YES NO If yes, NAME & No.#: \_\_\_\_\_
- Do you have insurance agent? (circle) YES NO If yes, NAME & No.#: \_\_\_\_\_

Is your estate, real estate, retirement, bank accounts, interests in businesses or intellectual property, life insurance, etc.) (circle one)

Less than \$700,000?

More than \$700,000?

Fill in people's name to the best of your ability.

Which individual would you trust to handle your finances if you would, g-d forbid, become disabled?

- 1.
- 2.
- 3.

Which individual would you trust to handle your estate's finances, such as paying final bills, funeral expenses, and taxes, when you die?

- 1.
- 2.
- 3.

Which individuals would you or do you trust to manage your finances?

- 1.
- 2.
- 3.

What are the top three concerns about your estate?

- 1.
- 2.
- 3.

What other questions do you have for the attorney?

- 1.
- 2.
- 3.

For your convenience, we also have satellite locations in West Los Angeles & Ventura County, as well as home visits if necessary.  
Call us to help you determine your next step.

**805-987-2500**

**[www.naomistal.com](http://www.naomistal.com)**

**Call us to schedule an initial consultation.**