

MULLAVEY, PROUT, GRENLEY & FOE LLP

ESTATE PLANNING QUESTIONNAIRE

INSTRUCTIONS: Please complete this Questionnaire and bring it with you to our meeting. Please feel free to attach additional pages if you do not have enough room or wish to attach explanatory pages. If you have questions regarding any item, please place a “?” in the blank and we will discuss your questions at our meeting. **Please also bring copies of any current estate planning documents to our meeting.**

Meeting Date: _____ Attorney: _____

A. **PERSONAL**

1. Name: _____

2. Other Names: _____

3. Addresses:

a. Home _____

b. Mailing: _____

4. Telephone:

a. Home: _____

b. Work: _____

5. Age: _____

6. Email Address _____

7. Citizenship: _____

