

BRADFORD MILLER LAW, P.C.

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ESTATE PLANNING QUESTIONNAIRE

Date: _____

Name(s): _____

Address: _____

Phone: _____

Email: _____

Is your principal residence in Illinois? _____

Have you ever made a Will or Trust? _____

Are you a US Citizen(s)? _____

Marital status: _____

Do you have any children? _____

-If yes, please give their names and ages: _____

Do you have a safe deposit box? _____

Do you own any Real Estate? _____

-If yes, please give location(s): _____

Do you believe your NET worth* is over \$1 million dollars? _____

** NET worth is basically the amount of money left after all bills, loans, mortgages, etc have been paid. It does not include any life insurance policies.*

Please note that these are intended to be very general questions to give us an idea of what type of estate planning would suit your needs. We will gather more detailed information from you at a future date, should you decide to retain our services.