

EXECUTORSHIP QUESTIONNAIRE

NAME: _____

DATE: _____

- ▭ **Section 1** **Personal Objectives**
- ▭ **Section 2** **Personal Advisors**
- ▭ **Section 3** **Instructions for Will**
- ▭ **Section 4** **Enduring Power of Attorney**
- ▭ **Section 5** **Instructions for Personal Directive**
- ▭ **Section 6** **Documents Your Advisor(s) Will Need to Review**

SECTION 1 – PERSONAL OBJECTIVES

CASH NEEDED AT DEATH

<i>Item</i>	<i>Amount Required</i>
Funeral and other last expenses	\$
Loans and mortgages	
Emergency fund	
Education fund for children	
Special bequests to other family members	
Special bequests to charities	
Other (specify)	

INCOME NEEDS AFTER INCOME TAXES (MONTHLY)

<i>Item</i>	<i>Amount Required</i>
Life income for spouse and dependants at your death	\$
Income if disabled	
Retirement income at age _____	
Rate of inflation	
Investment rate of return	

PRIORITIES (Rank 1 through 5)

- Family income at death
- Disability income
- Retirement income
- Continuation of Business
- Estate liquidity

Any other personal objectives or pertinent information:

SECTION 2 – PERSONAL ADVISORS