EXECUTORSHIP QUESTIONNAIRE

NAME: ____

DATE:____

SECTION 1 – PERSONAL OBJECTIVES

CASH NEEDED AT DEATH

Item	*Amount Required*
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)

Item	*Amount Required*
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:

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SECTION 2 – PERSONAL ADVISORS