



Confidential Estate Planning Personal Questionnaire

Personal Effects

Type: Major personal effects such as motor vehicles, boats and all other valuable non-business personal property (indicate type below and give a lump sum value for miscellaneous items).

Type	Owner	Value	Yes	No
_____	_____	\$ _____	_____	_____
_____	_____	\$ _____	_____	_____
_____	_____	\$ _____	_____	_____
_____	_____	\$ _____	_____	_____
_____	_____	\$ _____	_____	_____
_____	_____	\$ _____	_____	_____
_____	_____	\$ _____	_____	_____
_____	_____	\$ _____	_____	_____

Total \$ _____

Mortgages, Notes & Other Receivables

Type: Mortgages or Promissory Notes, payable to you; other monies owed to you. Please provide Beauchat & Beauchat, LLC with a copy of the promissory note(s).

Name of Debtor	Date Due	Owed to	Current Balance
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

Total \$ _____



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Partnership Interests

Type: General and Limited Partnerships. Please list the percentage(s) you own. Please provide Beauchat & Beauchat, LLC with a copy of the Partnership Agreement.

Name of Partnership _____

Owner(s) _____ Value \$ _____

Who holds Partnership papers _____ Phone # (____) _____

Name of Partnership _____

Owner(s) _____ Value \$ _____

Who holds Partnership papers _____ Phone # (____) _____

Name of Partnership _____

Owner(s) _____ Value \$ _____

Who holds Partnership papers _____ Phone # (____) _____

Total \$ _____

Corporate Business And Professional Interest

Type: Privately owned (non-publicly traded) stock. Please provide Beauchat & Beauchat, LLC with a copy of any Buy/Sell Agreements, if applicable.

Company _____ Address _____ Phone # (____) _____

Number of Shares _____ % of Ownership _____ Value \$ _____

Is there a Buy/Sell Agreement ___Yes ___No Is this an "S-Corporation" ___Yes ___No

Company _____ Address _____ Phone # (____) _____

Number of Shares _____ % of Ownership _____ Value \$ _____

Is there a Buy/Sell Agreement ___Yes ___No Is this an "S-Corporation" ___Yes ___No

Company _____ Address _____ Phone # (____) _____

Number of Shares _____ % of Ownership _____ Value \$ _____

Is there a Buy/Sell Agreement ___Yes ___No Is this an "S-Corporation" ___Yes ___No

Total \$ _____



Confidential Estate Planning Personal Questionnaire

Sole Proprietorship Business And Proprietorship Interests



Type: All of the assets used by you in a sole proprietorship type of business ownership.

Name of Business	Description of Business	Owner(s)	Value
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
Total			\$ _____

Oil, Gas And Mineral Interests



Type: Gifts or inheritances that you expect to receive at some time in the near future; or monies that you anticipate receiving through a judgment in a lawsuit.

Company _____ Type _____ Name _____
 Address _____ City _____ State _____ Zip _____
 County _____ Phone # (____) _____ Owner _____ Value \$ _____

Company _____ Type _____ Name _____
 Address _____ City _____ State _____ Zip _____
 County _____ Phone # (____) _____ Owner _____ Value \$ _____

Total \$ _____

Anticipated Inheritance, Gift, Or Lawsuit Judgment



Description	Value	
_____	\$ _____	
_____	\$ _____	
Total		\$ _____



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Real Estate

Type: All of the assets used by you in a sole proprietorship type of business ownership.

Address	Owner(s)	Fair Market Value
_____	_____	\$ _____
City _____ State _____ Zip _____		
County _____		
_____	_____	\$ _____
City _____ State _____ Zip _____		
County _____		
_____	_____	\$ _____
City _____ State _____ Zip _____		
County _____		
	Total	\$ _____

Other Assets

Type: Any property that you own which does not fit into any other category.

Address	Owner	Value
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
	Total	\$ _____

GRAND TOTAL OF ALL ASSETS
DISCLOSED IN THIS QUESTIONNAIRE

Total \$ _____