



ZACHARIA BROWN

Estate Planning & Elder Law Attorneys

111 W. McMurray Road
4500 Walnut Street
7500 Brooktree Road, Suite 303
6530 Route 22, Suite 310

McMurray, PA 15317
McKeesport, PA 15132
Wexford, PA 15090
Delmont, PA 15626

Tel:(724) 942-6200
Tel: (412) 751-5670
Tel:(724) 942-6200
Tel: (412) 751-5670

Florida Offices in Bonita Springs, Lakewood Ranch and Pompano Beach

ELDER LAW AND ESTATE PLANNING QUESTIONNAIRE – SINGLE PERSON

This form is extremely important. Your accuracy and completeness in responding will help Zacharia Brown PC represent you. Please send this completed information packet, including each of the items requested, a few days prior to your initial consultation.

CLIENT

Name: _____

Street: _____

City: _____

State: _____

Zip: _____

Home Phone: _____

Cell Phone: _____

Email: _____

Date of Birth: _____

Age: _____

US Citizen? Yes No

Veteran? Yes No

If yes, Branch and Dates of Service:

Physical / Medical Condition

Physician

PRIMARY CONTACT

Name: _____

Street: _____

City: _____

State: _____

Zip: _____

Home Phone: _____

Cell Phone: _____

Email: _____

Date of Birth: _____

Age: _____

Relation:

Comments / Notes

LONG TERM CARE SERVICES

Is the person receiving Long Term Care Services?	Yes	No
Name of Facility/Caregiver/Provider:	_____ Date Onset: _____	
Address:	_____	
City State Zip:	_____	
Business Phone:	_____	Administrator/Contact: _____
Date Entered:	_____	
Medicare Coverage End Date:	_____	
Facility paid through:	_____	

Income		
Social Security:	\$ _____	Part B Deduction: \$ _____
Pension	\$ _____	Medical Insurance Company:
Veterans	\$ _____	_____
_____	\$ _____	Monthly Premium \$ _____
_____	\$ _____	Part D Company:
_____	\$ _____	_____
		Monthly Premium \$: _____

<u>DEBTS</u>		
Do you have a mortgage on your home?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount \$ _____
Do you owe money on any vehicles?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount \$ _____
Do you have any credit card debts?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount \$ _____
		Total \$ _____ 0

CHILDREN

NAME	ADDRESS	Child of	Sex
		<input type="checkbox"/> Both <input type="checkbox"/> Husband <input type="checkbox"/> Wife	<input type="checkbox"/> Male <input type="checkbox"/> Female
		<input type="checkbox"/> Both <input type="checkbox"/> Husband <input type="checkbox"/> Wife	<input type="checkbox"/> Male <input type="checkbox"/> Female
		<input type="checkbox"/> Both <input type="checkbox"/> Husband <input type="checkbox"/> Wife	<input type="checkbox"/> Male <input type="checkbox"/> Female
		<input type="checkbox"/> Both <input type="checkbox"/> Husband <input type="checkbox"/> Wife	<input type="checkbox"/> Male <input type="checkbox"/> Female
		<input type="checkbox"/> Both <input type="checkbox"/> Husband <input type="checkbox"/> Wife	<input type="checkbox"/> Male <input type="checkbox"/> Female
		<input type="checkbox"/> Both <input type="checkbox"/> Husband <input type="checkbox"/> Wife	<input type="checkbox"/> Male <input type="checkbox"/> Female
		<input type="checkbox"/> Both <input type="checkbox"/> Husband <input type="checkbox"/> Wife	<input type="checkbox"/> Male <input type="checkbox"/> Female
		<input type="checkbox"/> Both <input type="checkbox"/> Husband <input type="checkbox"/> Wife	<input type="checkbox"/> Male <input type="checkbox"/> Female

Are all of your children in Good Health? Yes No

Are any of your children blind? Yes No

Are any of your children disabled? Yes No

Are any of your children receiving SSI? Yes No

Are any of your children on Medicaid? Yes No

Alcohol Problems? Yes No

Drug Addiction? Yes No

Debts / Bankruptcy Yes No

Gambling Problems? Yes No

Marital Problems? Yes No

If yes to any of the above, please explain:

ASSETS

A. REAL ESTATE OWNED

Address _____

Market Value \$ _____

City St. Zip _____

Date Purchased _____

Mortgage Owed \$ _____

Acquisition Price \$ _____

Is this Home? _____

Who Resides There _____

Name(s) on Deed: _____

Comments: _____

Address _____

Market Value \$ _____

City St. Zip _____

Date Purchased _____

Mortgage Owed \$ _____

Acquisition Price \$ _____

Is this Home? _____

Who Resides There _____

Name(s) on Deed: _____

Comments: _____

Address _____

Market Value \$ _____

City St. Zip _____

Date Purchased _____

Mortgage Owed \$ _____

Acquisition Price \$ _____

Is this Home? _____

Who Resides There _____

Name(s) on Deed: _____

Comments: _____

B. BANK ACCOUNTS

Bank	Type	Account No	Owner(s)	Current Balance
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
TOTAL				\$ _____ 0

C. INVESTMENT ACCOUNTS (Exclude IRAs, Enter these in 'D')

Company	Type	Account No	Owner(s)	Current Balance
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
TOTAL				\$ _____ 0

D. INDIVIDUAL RETIREMENT ACCOUNTS (IRAs)

Company	Type	Account No	Owner(s)	Current Balance
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
Total				\$ _____

E. LIFE INSURANCE (Do not include Group or Term Life Policies)

Company	Policy	Owner(s)	Face Value	Cash Value
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
			Total	\$ _____

F. VEHICLES (Include Cars, Trucks and Boats)

Make	Model	Year	Owner(s)	Amount Owed	Current Value
_____	_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	_____	\$ _____	\$ _____
				Total	\$ _____ 0

G. BUSINESS INTERESTS (Please Describe and Value and Business Interests You Own)

_____	\$ _____
_____	\$ _____
Total	\$ _____

H. GIFTING (Please List any and all Gifts you made in the past five (5) years)

Given to	Date	Reason	Amount
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
			Total \$ _____ 0

I. REFERRAL (Who Referred you to Zacharia Brown?)

J. Do you Currently have the following Estate Plan Documents?

Last Will & Testament Yes No

Power of Attorney Yes No

Health Care Proxy Yes No

Living Will Yes No

Trust Yes No

Long Term Care Ins. Yes No

Long Term Care Insurance Company

Monthly Benefit \$ _____

K. MISCELLANEOUS

Do you have any other issues you think we should be aware of?

CERTIFICATION

The undersigned hereby represents to Zacharia Brown PC that the information contained in this questionnaire (including the attached schedules) is accurate and complete, and that the undersigned understands that the law firm will rely on this information. If the information contained herein is inaccurate or incomplete, the recommendations made by Zacharia Brown PC may not be appropriate.

Date: _____

Signature of Client or Client Representative