Estate Planning Client Questionnaire

Free printable planning worksheet • NOT a legal document or software-generated form

Client & matter

Client / matter reference

Meeting date / preparer

State(s) relevant to planning

Household and family

Marital / partnership status and relevant family circumstances

Children, dependents and special considerations

Current estate plan

Prior wills, trusts, POAs, and directives to review

Known property or beneficiary-designation concerns

Planning objectives

Top three priorities or concerns

People to consult / documents to request

Internal follow-up

Questions for attorney review

Next step / target meeting date

Use for discussion and internal intake only. This worksheet does not create, replace or execute a will, trust, power of attorney or advance directive. Verify all content and signing requirements under applicable state law.