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RAYMOND H. DRESSER  
(1901-1968)

JOHN E. OSTER  
(1948-1981)

RAYMOND H. DRESSER JR.  
(1931-2013)

To Our Clients:

In order for us to properly assist you in planning your estate, we must know the nature and value of your assets. This information will allow us to understand your estate planning needs. Please take a few minutes to fill out this Questionnaire. All of the information requested is important, and you may find that completing this form is helpful to you as a review of your present situation. We will retain this document as part of your permanent file in our office, but be assured that all of the information you furnish is strictly confidential, and will not be disclosed to anyone outside of our firm without your permission. Please bring this form with you when you come to our office for your first appointment. Thank you.

**CONFIDENTIAL ESTATE PLANNING QUESTIONNAIRE**

**Date Completed:** \_\_\_\_\_

1. Do you now have a Will? \_\_\_\_\_

2. Names:

Husband: \_\_\_\_\_  
Social Sec. No. (Optional): \_\_\_\_\_ Birth date: \_\_\_\_\_ U.S. Citizen? \_\_\_\_\_

Have you ever lived in a community property state (e.g., Arizona, Texas, California or Louisiana)?

\_\_\_\_\_

Wife: \_\_\_\_\_  
Social Sec. No. (Optional): \_\_\_\_\_ Birth date: \_\_\_\_\_ U.S. Citizen? \_\_\_\_\_

Have you ever lived in a community property state (e.g., Arizona, Texas, California or Louisiana)?

\_\_\_\_\_

3. Home Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

4. Employers:

Husband: \_\_\_\_\_

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Wife: \_\_\_\_\_

5. Approximate yearly income of both spouses combined: \_\_\_\_\_

6. Children

Name, Address and Birth dates:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Name and relationship of anyone else dependent on you for support:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. Are you or any of your children or dependents under any physical or mental disability? If so, please explain:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. If either spouse is enrolled in a pension, profit sharing or retirement plan, please provide brief details:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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10. Does either spouse have an Individual Retirement Account (IRA)? If so, please describe:

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11. Real estate owned: Please list the information requested under the appropriate headings. Continue on the back of last page of the form if you need more space.

	Address:	Owned by Husband, Wife, or Joint?	Mortgage Balance	Estimated Value
Principal Residence:				
Second Home(s):				
Farms – Indicate Acreage				
Income Properties:				
Land Contract Interests – Buyer or Seller?				

Please determine the whereabouts of your deeds and abstracts (or title insurance policies) for your real estate. We may need this information later.

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12. Stocks, bonds and mutual funds listed in that order and labeled “S” for stock, “B” for bond, “D” for debenture and “F” for mutual fund:

S, B, D or F	Name of Company	Owned by Husband, Wife or Joint	Number of Shares	Estimated Present Value

If you do not have this information already, it can be very important for tax purposes to know when you purchased stocks and bonds, and for what price. Depending on your situation, request this information as part of this process. .

13. Cash, bank accounts, certificates of deposit and money market funds:

Name of Institution	Type of Account	Husband, Wife, or Joint Account	Approximate Present Balance

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14. Life Insurance (include insurance provided by employer):

Name of Company	Whose Life?	Whole Life or Term?	Beneficiary?	Policy Amount

15. Do you own a business, or any interest in a business? If so, please provide brief details as to the name, location and nature of the business and provide us with a copy of the most recent balance sheet. We will discuss further questions with you when we meet.

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16. Farmers: Please list aggregate values for farm machinery and equipment, livestock, growing crops and crops in storage.

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17. Motor vehicles, motorcycles, boats and recreational vehicles: Please list make and year, name of titled owner and approximate value.

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18. Do you know of any environmental problems in connection with any real estate you are involved with?

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19. Do you have any personal property of unusual value, such as jewelry, works of art, antiques or collections? Please list brief details and estimated values.

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20. Does anyone owe you any substantial amount of money? Please give details.

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21. Does either spouse expect to receive an inheritance of over \$10,000? \_\_\_\_\_

If yes, please give details: \_\_\_\_\_

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22. Have you ever made any gifts over \$10,000 or filed a gift tax return? \_\_\_\_\_

If yes, please give details: \_\_\_\_\_

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23. Names of banks with whom you do business: \_\_\_\_\_

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24. Location of your safety deposit box: \_\_\_\_\_  
\_\_\_\_\_

25. Name and address of your accountant or tax preparer: \_\_\_\_\_  
\_\_\_\_\_

Thank you for your assistance. We will be glad to discuss any questions with you personally at our first meeting.

HAASCAYWOOD PC  
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Sturgis, Michigan 49091  
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