

Stephen L. Friedman, CPA

PERSONAL INSURANCE AND ESTATE PLANNING QUESTIONNAIRE

Dear Client:

In an effort to provide you with the best possible service on a pro-active basis and to ensure that your family's interests are well protected in the future, we would like to ask you to complete this questionnaire. Please provide simple "Yes" or "No" answers to the following questions below and return this questionnaire to us upon completion. All answers will be treated in utmost confidence.

Details	Mr.	Mrs.
Name		
Date Of Birth		
Phone (Home)		
Phone (Work)		

Question	Yes	No
1. Many people today are very concerned because of potentially serious financial difficulties due to inadequate protection in case of disability, long-term care, or premature death. Are you concerned about that?		
2. Will you be able to continue to pay your mortgage and meet all other financial obligations in case you become disabled?		
3. Will you be able to pay \$4,000-\$5,000 per month for long-term care, which is not covered by HMOs, PPOs, and Medicare, for one, two, or three years?		
4. Will your family be able to continue to pay the mortgage and keep your house in case of your premature or sudden death?		
5. Do you and your spouse have a will?		
6. Was your and your spouse's will reviewed and updated during the last twelve months?		
7. Do you and your spouse have a Family Trust?		
8. Did you know that a Family Trust is used primarily to avoid probate and protect assets in case of legal problems? It does not help in reducing estate taxes.		
9. Did you discuss your estate planning needs with an estate planning attorney during the last twelve months?		
10. If you would have a way to cover your mortgage and all other expenses in case of your disability, would that help you?		
11. If you would have a way to cover your and your spouse's long-term care costs in the future, if required, would that help you?		
12. If you would have a way to ensure that your family will not loose your house in case of your premature or sudden death, would that help you?		
13. Would you like to know which plans are available to provide you peace of mind in case of disability, long-term care, and premature or sudden death?		
14. Would you like to know how IRS can contribute to your peace of mind and at the same time substantially reduce your tax bill?		
15. Would you like to know which plans will provide you and your family peace of mind and refund all your premiums, so it will cost you almost nothing?		
16. Would you like to know which plans will provide you and your family peace of mind and enable you to substantially reduce your insurance costs?		
17. Is it in your interests to ensure that your family is fully protected in case of disability, long-term care, and premature death of any family member?		
18. Would you like to find out how you could eliminate estate taxes and pass your estate tax-free to your beneficiaries?		

Completed By:	Date:
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