ESTATE SNAPSHOT QUESTIONNAIRE

*Please use this as a guide for completing the MyCase Proposal submission.

Client Information

	Name	State of Residence	Date of Birth	Gender	Unified Credit Remaining*
Client 1:					$
Client 2:					$

*If left blank, we will assume full unified credit is intact

Income Sources (Deferred Compensation, Pensions, Social Security, etc.)

Type	Income (Yearly)	Owner	Age Income Begins	Age Income Stops	Cost of Living Adjustment
	$				%
	$				%
	$				%
	$				%
	$				%

Income Needs	$
Cost of Living Adjustment	%

Investible Assets

Account Name	Owner	Account Value	Registration	Annual Contributions until Retirement
		$		$
		$		$
		$		$
		$		$
		$		$
		$		$
		$		$
		$		$
		$		$

Business Assets

Name	Owner	Account Value
		$
		$
		$
		$
		$
		$

Plan for business assets (e.g. Sale in 5 years paid in installments, leave to heirs at death, etc)

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Real Estate

Name	Owner	Value	In/Out of Estate
		$	
		$	
		$	
		$	
		$	
		$	

Assumed Appreciation of Real Estate	%

Insurance Policies

Insurance Type	Insured	Premium	Premium Duration	Benefit	In/Out of Estate
		$		$	
		$		$	
		$		$	
		$		$	
		$		$	
		$		$	

Heirs

Name	Birthdate	Relation

Estate Assumptions

Federal Estate Tax Rate*	%	*If blank we will assume 40%
Growth of Estate Tax Exemption**	%	**If blank we will assume to grow at 2% annually

Notes/Comments

(include current estate planning or possible estate planning techniques you would like to consider and underwriting assumptions)

V.10.2016