

Ted W. Hoyt*
D. Reardon Stanford**
Hannah M. Dardar



315 S. College Road | Suite 165
Lafayette, Louisiana 70503
337.234.1012
Fax: 337.234.1128

* LLM in Taxation
Board Certified Tax Attorney (LA)
Admitted in: Louisiana, New York, and D.C.

www.hoytlaw.com

** Board Certified Family Law Specialist

Sender's Email: thoyt@hoytlaw.com

CLIENT QUESTIONNAIRE

DATE: _____ REFERRED BY: _____

FULL NAME OF CLIENT: _____

ADDRESS: _____

PHONE NUMBER: _____

EMAIL ADDRESS: _____

DATE OF BIRTH: _____

FULL NAME OF SPOUSE: _____

SPOUSE PHONE NUMBER: _____ EMAIL ADDRESS: _____

SPOUSE DATE OF BIRTH: _____

PLEASE NOTE: In order to give you the best advice and counsel, please give as much information as possible. Since everyone's situation is different, this questionnaire has been prepared to include information which may or may not be needed for your particular case. If you feel certain information is not pertinent, please feel free to omit. If you feel you need to give more information than is requested, please feel free to add in comment section at the end of this questionnaire or on a separate page.

WILL & ESTATE PLANNING INFORMATION

(If you presently have a Will please attach a copy)

1. Full names, birth dates and social security numbers of children.

FULL NAME	DATE OF BIRTH	SOCIAL SECURITY #	BORN OF MARRIAGE?
Child	_____	_____	_____
Child	_____	_____	_____
Child	_____	_____	_____
Child	_____	_____	_____

2. Complete names of former spouses:

Husband: _____

Wife: _____

3. EXECUTOR AND CONTINGENT EXECUTOR: The Executor is the person who executes all documents on behalf of a deceased person's succession, in the event that the succession is sent into an administration. An administration may be necessary in the event there is pending litigation on behalf of or against the decedent, if there is a business owned or partially owned by the decedent, if there are properties which must be sold in order to pay death taxes or in the event of other matters pending which will not allow for the heirs to immediately be placed in possession of the decedent's estate. More often than not, the Executor does not take office and the heirs are immediately put into possession, however, in order to provide this contingency and waive all bond requirements should that Executor need to take office, we will need to provide for an Executor and a contingent Executor in your Wills. We generally recommend that the surviving spouse be named as Executor and one of the children or another trusted individual be named as contingent Executor. Please indicate your choice below:

HUSBAND

Executor _____

Contingent Executor _____

WIFE

Executor _____

Contingent Executor _____

4. USUFRUCT TO THE SURVIVING SPOUSE: Under Louisiana law, a usufruct over any of the property left to the surviving spouse will terminate upon remarriage unless a usufruct for life is granted in the Last Will and Testament. Please indicate your choice below:

Usufruct for Life:

Yes _____

No _____

5. GUARDIAN OF MINOR CHILDREN: Under Louisiana law, the last parent to die gets to name the guardian of any minor children. The Guardian is the person that will take physical control of the minor children and raise the children.

Guardian _____

Contingent Guardian _____

POWER OF ATTORNEY

1. Whom do you wish to act on your behalf if you should become physically or mentally incapacitated?

1st Choice:

Name: _____
Address: _____
City: _____
State: _____ **Zip Code:** _____

2nd Choice:

Name: _____
Address: _____
City: _____
State: _____ **Zip Code:** _____

3rd Choice:

Name: _____
Address: _____
City: _____
State: _____ **Zip Code:** _____

TRUSTS

If you would like to establish a Trust, please fill out the following:

1. Settlers:

Names: _____

Addresses: _____

2. Trustees (If different than Settlers):

Names: _____

Addresses: _____

3. Successor Trustee(s):

First Successor:

(Name) _____
(Address) _____

Second Successor:

(Name) _____
(Address) _____

4. Beneficiaries:

(a) Income Beneficiaries:

Name: _____
Address: _____

Name: _____
Address: _____

Name: _____
Address: _____

Name: _____
Address: _____

Name: _____
Address: _____

(b) Principal Beneficiaries

How do you wish your assets to be distributed on a percentage (%) basis or dollar amount?

	<u>Name</u>	<u>Age</u>	<u>Relationship</u>	<u>Share</u>
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____

(c) Special Bequests:
