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SUBMITTING THIS QUESTIONNAIRE DOES NOT CREATE AN ATTORNEY-CLIENT RELATIONSHIP

Estate Planning Questionnaire

Confidential Client Intake

Welcome — here is how this form works

A complete estate plan is a set of documents, each with a different job. The table below explains them in plain English. Sections 1 and 2 ask about you, your family, and your assets — please complete those. After that, **each document has its own short section**, and if you do not want a particular document right now, you can skip its section (each one tells you which page to turn to). If you run out of room anywhere, attach a page or continue at the end of the form.

Document	What it is — and why you might want it
Will	Says who receives your property, names the **executor** who will carry out your wishes, and (if you have minor children) nominates a **guardian**. The foundation of most plans.
Revocable living trust	An alternative to a will-based plan that can avoid probate, keep your affairs private, and manage your assets if you become incapacitated. If this interests you, ask us for the separate Living Trust Questionnaire.
Durable (financial) power of attorney	Lets someone you choose handle your finances if you cannot — for example, in case of mental incapacity (dementia, Alzheimer's, a stroke). The main way to avoid a court guardianship of your estate.
Medical power of attorney	Names someone to make health-care decisions for you if you cannot — for example, in case of medical incapacity (a car or work accident, a seizure).
Directive to physicians	Records your wishes about life-sustaining treatment near the end of life. Some people call it a "living will."
HIPAA authorization	Lets the people you name receive your medical information; it pairs with the medical power of attorney.
Designation of guardian	Says, in advance, who should serve as guardian for your minor children — and, if you wish, for you.
Appointment for disposition of remains	Names who will control your burial or cremation and makes your funeral wishes binding.

SECTION 1: ABOUT YOU & YOUR FAMILY

Full legal name ______________________________

Date of birth ______________________ Phone ______________________

Email

Home/residence address (street, city, state, ZIP)

County of residence

Are you a U.S. citizen? ☐ Yes ☐ No

If you or your spouse is not a U.S. citizen
Special estate-tax rules can apply (for example, a "QDOT" trust for a noncitizen spouse). If either of you is not a U.S. citizen, please flag it — it may change the plan.

Do you already have a will, trust, or powers of attorney (in Texas or another state)? ☐ Yes ☐ No

If yes, when were they signed and where are the originals kept?

Your spouse and marriage

Marital status:

☐ Never married ☐ Married ☐ Divorced ☐ Widowed

Spouse's full legal name

Spouse's date of birth (optional)

Spouse's phone (optional)

● Texas is a community-property state
In general, property acquired during marriage is presumed community property, while property owned before marriage — or received by gift or inheritance — is separate property. By will, you can generally dispose of your separate property and your one-half of the community property. You do not need to categorize your assets now.

Do you and your spouse have a premarital (prenuptial), postnuptial, or marital property agreement? (If yes, please bring a copy.) ☐ Yes ☐ No

Has anyone in the marriage been married before, or are there children from another relationship? ☐ Yes ☐ No

If yes, please briefly explain (this affects planning):

Your children (including adopted children and children from any relationship)

In the "B / A" column, write B (biological) or A (adopted). In "Living?", if a child has died, write the date of death.

Full name	Date of birth	B / A	Living?	Other parent

Are any of your children minors, or does any child or beneficiary have a disability or special needs? ☐ Yes ☐ No

If yes, who, and please describe:

Special-needs planning

If a beneficiary receives (or may need) means-tested benefits such as Medicaid or SSI, an outright gift can disqualify them. A special-needs trust can provide for them without disrupting benefits — flag this for us.

● Disinheritance — please read

Do you intend to disinherit — that is, intentionally leave nothing to — any of your children or other descendants? In Texas this must be done explicitly and carefully; an accidental omission can be challenged.

☐ Yes ☐ No

If yes, whom? (Write "none" if this does not apply.)

SECTION 2: YOUR ASSETS & TAX PICTURE

You do not need exact values

Just check the categories that apply. A separate, optional Asset Worksheet is available if you would like to provide more detail — but we may not need it.

Check all that you (or you and your spouse) own:

- ☐ Primary home (Texas)
- ☐ Other real estate in Texas
- ☐ Real estate in another U.S. state
- ☐ Real estate in another country
- ☐ Cash / checking / savings accounts

List continues on the following page

- ☐ Brokerage / stock / investment accounts
- ☐ Retirement accounts (401(k), IRA, pension)
- ☐ Life insurance or annuities
- ☐ Business interest (LLC, corporation, partnership)
- ☐ Vehicles or boats
- ☐ Aircraft (or a fractional interest in an aircraft)
- ☐ Timeshare or similar recurring-use interest
- ☐ Valuable personal property (jewelry, art, collections, firearms)
- ☐ Cryptocurrency or other digital assets
- ☐ Mineral, oil & gas, or royalty interests
- ☐ Money owed to you (promissory notes)

If you have cryptocurrency, how is it held?

☐ On an exchange (custodial) ☐ Self-custody (cold wallet / hardware device)

Are you a beneficiary of anyone's trust, expecting a significant inheritance, or do you hold a power of appointment? ☐ Yes ☐ No

If yes, please describe:

Don't forget your beneficiary designations

Retirement accounts, life insurance, and many bank/brokerage accounts pass by beneficiary designation — NOT by your will. Keeping these current is part of a complete plan, and recent federal changes to inherited retirement accounts (the "10-year rule") make a review worthwhile.

Have you reviewed the beneficiary designations on your retirement accounts and life insurance recently? ☐ Yes ☐ No

Estate-tax exposure

● Current federal estate-tax exemption (2026)

Under current federal law, each person can pass roughly <u>$15 million</u> free of federal estate tax in 2026 (about <u>$30 million combined</u> for a married couple, using portability), indexed for inflation. **Texas has no state estate or inheritance tax.**

Could the total value of your estate — including life insurance and retirement accounts — approach or exceed about $12 million (or about $25 million combined, if married)? ☐ Yes ☐ No

If yes or unsure, note anything we should know (e.g., a business likely to grow in value):

Why we ask at $12 million, not $15 million

The tax kicks in around $15 million, but the most effective planning happens **before** you reach the line — so we start the conversation a few million dollars early. We also ask: have you made large lifetime gifts (over the annual exclusion) or filed gift-tax returns (IRS Form 709)?

Do you own real estate or a business in more than one U.S. state or in another country? ☐ Yes ☐ No

If yes, where?

Why multi-state property matters

Real estate in another state can trigger a second ("ancillary") probate there; property in another country can take years to settle. Both are avoidable with planning, so tell us about anything outside Texas.

● If you were just served with a lawsuit

Lawsuits have strict, short deadlines (often only a few weeks to respond). **Failure to respond within the timeframe can have disastrous consequences** (for example, *default*). If you have been served with a lawsuit, **please call us immediately at 210-817-4388.**

Please also be aware that booking a consultation **does not count as a response to your lawsuit**. Until we accept you as a client, **it remains your responsibility to timely respond.**

THE WILL

> **Want a will? If not, you can skip ahead**
> If you do not want a will at this time, skip the rest of this section and turn to page 9 — the next document begins there (the Durable Power of Attorney).

Do you want a will?

☐ Yes ☐ Not now ☐ Not sure — let's discuss

Specific gifts & charitable gifts (optional)

> **Optional — most people leave this blank**
> If you would like to leave a specific item to a specific person, or make any charitable gifts, list each gift and who should receive it below. If you need more room, attach a page or continue at the end of this form.

Specific bequests and charitable gifts — describe each gift and the recipient:

____

____

____

____

Everything else (your "residuary" estate)

> ● **Please complete this part**
> This is the heart of your will — who receives everything not given away above. Please do not leave this blank. If you are unsure how to divide things, just tell us your goals.
> Other than any gifts above, who should receive the rest of your property?
>
> Primary beneficiary(ies) — names and shares
>
> ____
>
> ____
>
> ____
>
> Alternate beneficiary(ies) — if a primary beneficiary does not survive you
>
> ____
>
> ____

If a beneficiary dies before you, should that person's share pass to their children? ☐ Yes ☐ No

If no, what should happen to that share instead?

____

Do your beneficiaries and family members generally get along well enough? ☐ Yes ☐ No

Is there anyone who might challenge your plan, or whom you are intentionally leaving out (an estranged relative, a former spouse, a business partner)? ☐ Yes ☐ No

If yes, please name them — this helps us check for conflicts and protect your plan:

Executor of your will

The executor gathers your assets, pays debts and taxes, and distributes what remains.

	Name	Relationship	City / State
Primary			
Alternate 1			
Alternate 2			

Independent administration saves time and money

Texas favors "independent" executors, who administer the estate with minimal court supervision and usually save real cost and delay. An out-of-state executor can serve but may need a Texas resident agent.

Guardian of your minor children (if applicable)

Who should raise your minor children if both parents are unavailable?

	Name	Relationship	City / State
Primary			
Alternate 1			
Alternate 2			

Your nomination is influential, but not automatically binding

A Texas court applies a "best interest of the child" standard and gives your choice serious weight, but makes the final decision. If you name a couple as co-guardians, Texas law generally requires that they be married to each other; otherwise, name one person.

Your pets

Pet (name, species, breed/color)	Who should receive / care for the pet?

Pets are handled differently from children

Unlike the guardian nomination above, this choice is binding: in Texas, pets are personal property, so your will passes ownership to whomever you designate. You may also set aside funds for the pet's care in a Texas "pet trust" (Property Code § 112.037).

Would you like to set aside money for your pets' care (a pet trust)? ☐ Yes ☐ No

Trustee for your minor children's money (if applicable)

This person manages money left to your minor children — it need not be the same person as the guardian.

	Name	Relationship	City / State
Primary			
Alternate 1			
Alternate 2			

At what age(s) should young beneficiaries receive their inheritance outright?

You can spread out distributions

Rather than handing a young adult everything at 18, many clients release the inheritance in stages (for example, at 25, 30, and 35), with funds available for health, education, and support in the meantime.

Digital assets

Would you like your will to authorize your executor to access and manage your digital assets (email, photos, accounts, cryptocurrency)? ☐ Yes ☐ No

● Self-custody crypto needs its own access plan — and please don't write passwords here

If you hold cryptocurrency in a self-custody (“cold”) wallet, a will alone does not give anyone access — only your private key or seed phrase does, so we need a concrete plan (for example, a hardware device or written seed phrase in a bank safe-deposit box). For security, do not write passwords or keys on this form. Tip: Apple, Google, and Facebook also let you name a “legacy contact.”

DURABLE (FINANCIAL) POWER OF ATTORNEY

Want a durable power of attorney? If not, you can skip ahead

If you do not want a durable power of attorney at this time, skip the rest of this section and turn to page 10 — the next document begins there (the Medical Power of Attorney).

Do you want a durable power of attorney?

☐ Yes ☐ Not now ☐ Not sure — let's discuss

This is mainly about planning for your own incapacity

Its central purpose is to prepare for a time when you cannot manage your own finances — for example, due to dementia, Alzheimer's, a stroke, or a serious accident. It lets a person you choose handle your accounts and property, and it is the main way to avoid a court guardianship of your estate. Incapacity will not happen to all of us — but it will happen to some of us, and this is how you prepare for it.

What is an "agent"?

An "agent" (sometimes called an "attorney-in-fact") is simply the person you authorize to act for you. Naming an agent does not give up any of your own authority while you can still act — it just lets that person step in when you cannot.

Your financial agent(s)

	Name	Relationship	City / State
Primary			
Alternate 1			
Alternate 2			

We generally recommend against naming co-agents

Naming two or more agents to act together can create practical and legal complications. We usually recommend one agent at a time, with alternates. Mr. Reiffert can explain the specific concerns at your consultation.

When should it take effect?

☐ Immediately (effective now)

☐ Only if I become incapacitated (a "springing" power)

Immediate vs. springing

An immediate power is simpler and more readily accepted by banks. A springing power does not take effect until a doctor certifies your incapacity — an extra step that delays your agent's authority until it is actually needed.

Any other instructions or restrictions you would like to give your agent?

MEDICAL POWER OF ATTORNEY

Want a medical power of attorney? If not, you can skip ahead

If you do not want a medical power of attorney at this time, skip the rest of this section and turn to page 11 — the next document begins there (the Directive to Physicians).

Do you want a medical power of attorney?

☐ Yes ☐ Not now ☐ Not sure — let's discuss

What it does

This names someone to make health-care decisions for you if a doctor determines you cannot make them yourself. Imagine being unconscious after a car accident, a fall from a ladder, or a seizure when an urgent decision must be made — who do we call? That is the person you name here.

What is an "agent"?

An "agent" (sometimes called an "attorney-in-fact") is simply the person you authorize to act for you. Naming an agent does not give up any of your own authority while you can still act — it just lets that person step in when you cannot.

Your health-care agent(s)

	Name	Relationship	Phone
Primary			
Alternate 1			
Alternate 2			

Anyone you do NOT want involved in your medical decisions, or other instructions?

Would you like a HIPAA authorization so your agents and loved ones can obtain your medical information? (We strongly recommend pairing one with your medical power of attorney.) ☐ Yes ☐ No

Any other instructions or restrictions you would like to give your agent?

DIRECTIVE TO PHYSICIANS

Want a directive to physicians? If not, you can skip ahead

If you do not want a directive to physicians at this time, skip the rest of this section and turn to page 12 — the next document begins there (the Disposition of Remains).

Do you want a directive to physicians?

☐ Yes ☐ Not now ☐ Not sure — let's discuss

What this is

A directive to physicians records your wishes about life-sustaining treatment near the end of life. Some people call it a "living will," but that is not an official term in Texas. Two situations matter:
- **Terminal condition** — an incurable condition that, even with treatment, is expected to cause death within about six months.
- **Irreversible condition** — a condition that cannot be cured and leaves you permanently unable to care for yourself; without life-sustaining treatment it is ultimately fatal (so it generally becomes terminal in time).

These questions ask only about life-SUSTAINING treatment in those narrow situations — you are not giving up treatment that could save your life.

If you had a TERMINAL condition, would you want life-sustaining treatment continued? (If "No," you would still receive comfort care.)	☐ Continue	☐ Comfort only
If you had an IRREVERSIBLE condition that left you permanently unable to care for yourself, would you want life-sustaining treatment continued?	☐ Continue	☐ Comfort only

Any other end-of-life wishes (for example, pregnancy, religious or cultural wishes)?

____

____

DISPOSITION OF REMAINS & FUNERAL WISHES

Want a remains directive? If not, you can skip ahead

If you do not want a remains directive at this time, skip the rest of this section and turn to page 13 — the next document begins there (the Final Notes).

Do you want a disposition-of-remains appointment?

☐ Yes ☐ Not now ☐ Not sure — let's discuss

Your preference for your remains:

☐ Burial ☐ Cremation ☐ Other ☐ No preference

Would you like to be an organ or tissue donor? ☐ Yes ☐ No / already registered

Do you already have prepaid or pre-arranged plans (a plot, a cremation plan, military or family arrangements)? ☐ Yes ☐ No

If yes, with whom / where?

Did you serve in the military, and would you like military funeral honors? ☐ Yes ☐ No

If yes, which branch, and any preferred cemetery or location?

Would you like to appoint an agent to control the disposition of your remains? ☐ Yes ☐ No

If yes, who? (name and relationship)

Two ways to record these wishes

We can include your wishes in your **will**, which is technically nonbinding but usually followed out of respect, or prepare a separate **appointment of agent for disposition of remains** (Health & Safety Code § 711.002), which is binding. We will help you choose.

Any other funeral, burial, or memorial instructions?

FINAL NOTES

Your "letter of wishes"

You can include nonbinding requests here — guidance your executor and family are asked, but not legally required, to follow. Lawyers often call this a "letter of wishes." Attach a page if you need more room.

Any other wishes, guidance, or information you would like to include?

____

____

____

____

Your other advisors

Please list any current advisors we should coordinate with (CPA, financial planner, insurance, banker), or tell us if you would like an introduction.

Advisor type	Name	Phone / email

Anything else

Anything else you would like us to know before we meet?

____

____

____

When you've finished

Please either bring this completed form to your meeting or email it back to us — preferably by replying to the email address you received it from. (Our general info@ryanreiffert.com inbox has heavy spam filtering, so a reply to your original sender is most reliable.)

If you have any questions, you are welcome to bring them to your consultation, call us, or ask by email.

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