

304 Hickman Road
Charlottesville, Virginia 22911
Phone: 434-817-4001
www.vawills.com

Confidential Estate Planning Information

Name: _____

Date: _____

Before you begin:

This questionnaire has been designed to help you, not frustrate you. Complete it as best you can and please submit it to our office either in person or via email as early as possible prior to your meeting, so your attorney has ample time to review it. Do not spend an inordinate amount of time on it, and do not be concerned if you are unable to provide all the financial information we request on the form. Please know that all information you provide on this questionnaire will be held in strict confidence by the attorneys and staff at Virginia Wills, Trusts & Estates PLC.

Directions to our Pantops office:

From I-64: Take I-64 to Exit 124, which is the Pantops / Route 250 entrance into Charlottesville. Go west towards Charlottesville for about 8/10ths of a mile, then turn left onto State Farm Boulevard. Once you are on State Farm Boulevard, get in the right-hand lane and turn right onto Hickman Road. We are on the left-hand side of Hickman Road, the third building from the end of the street.

From Charlottesville: Take the Route 250 By-Pass (East) to the top of Pantops Mountain. About 1/10th of a mile after you crest the hill, turn right onto State Farm Boulevard (immediately after the DMV office.) Once you are on State Farm Boulevard, get in the right-hand lane and turn right onto Hickman Road. We are on the left-hand side of Hickman Road, the third building from the end of the street.

I. CLIENT CONTACT INFORMATION

Home Address

Street:_____

City:_____ State: VA Zip:_____

Your residence is located in which city or county? _____

Who referred you to this law firm? _____

Signature of person(s) who submitted this questionnaire: _____

1) How would you prefer to receive first drafts of estate planning documents?

☐ In a PDF/scan via e-mail ☐ Paper copies picked up at our office ☐ Paper copies via US Mail

2) We have read and agree to the Consent to Joint Representation (Article X) and to the Billing Practices:

_____ Spouse 1 Initials _____ Spouse 2 Initials

3) Please indicate the year of your marriage _____

	Spouse 1	Spouse 2
Full Legal Name		
Preferred Name		
Date of Birth		
Preferred Phone		
Occupation		
Employer		
E-Mail Address		

II. YOUR CHILDREN

Full Legal Name	Date of Birth	Parent[1]	City and State of Residence
		(select)	
		(select)	
		(select)	
		(select)	
		(select)	

[1] **J** (Joint); **S1** (Spouse 1); **S2** (Spouse 2)

III. YOUR FINANCIAL SUMMARY

Please use estimated current fair market values.

ASSETS	Assets that are Jointly Titled	Assets in Spouse 1's Name Alone	Assets in Spouse 2's Name Alone
Primary Residence			
Second Residence**			
Other Real Estate**			
Cash & Equivalents[1]			
Marketable Securities[2]			
Business Interests[3]			
Partnerships & LLC[4]			
Retirement Accounts[5]			
Annuities			
Valuable Tangibles[6]			
Total Death Benefit from all Life Insurance[7]			
Other Valuable Assets[8]			
TOTAL ASSETS			
LIABILITIES			
Mortgage, Residence			
Mortgage, 2nd Residence			
Other Debts			
TOTAL DEBTS			
NET WORTH			
Estimated Inheritance***			

** Indicate location(s) of your second residence or other real estate in Section IX.
*** What you believe you might inherit from others.

---

[1] Checking, savings, money market accounts, certificates of deposit, etc.
[2] Stocks, bonds, mutual funds, real estate investment trusts, and limited partnerships that are publicly traded.
[3] Businesses in which you actively participate.
[4] Partnerships and LLC interests which are not publicly traded.
[5] Retirement benefits provided through an employer such as a 401-k, IRA's, TIAA-CREF, etc.
[6] Automobiles, furnishings, jewelry, and collections, e.g., a coin or art collection.
[7] Please insert the total insurance proceeds from the "Death Benefit" line of Section V, next page.
[8] Any other valuable assets not listed above.

IV. ONLINE ACCOUNTS AND DIGITAL ASSETS

Do you **bank online**? Or have a significant presence on **social media** such as Facebook or Instagram? Or engage in regular **online purchases** or sales through companies such as Amazon? Or maintain your own **website or blog**? If you answered "yes" to any of these questions, it is vital that you leave your loved ones with sufficient information to locate and access your online accounts and "digital assets."

Digital assets, which can be quite valuable, include your email accounts, data you have stored on a hard drive, CD, DVD, server, or in the cloud (i.e., someone else's server), domain names, websites and blogs that you own, your music files and video games, and that unfinished novel on your laptop.

The estate planning documents we prepare will grant your executors, trustees, and agents under powers of attorney the authority to access your online accounts and digital assets. Your agents may use this access to gain possession of digital assets, close out online accounts, prevent post-mortem identity theft, and generally gather information needed to settle your worldly affairs. However, companies that host your email and web presence are likely to be unhelpful to your authorized agents seeking usernames and passwords needed to access your online accounts and digital assets upon your death. State and federal laws in place at this time are not helpful either.

Therefore, we strongly recommend you maintain a master list that (i) identifies and locates your online accounts and digital assets and (ii) contains your usernames, passwords, private keys and seed phrases for digital currency (if applicable), and other information necessary to access these accounts and assets. You must take this step on your own. It is independent of any services we might provide.

Be sure to store any username and password information in a secure location, such as a safe deposit box or a home safe. Let your loved ones know where to find your master list when it is needed. Keep it updated as you add accounts and change passwords.

V. YOUR LIFE INSURANCE

	Policy 1	Policy 2	Policy 3	Policy 4
Insured[1]				
Owner[2]				
Company				
Type[3]				
Beneficiary[4]				
Death Benefit				
Cash Value				

[1] **S1** (Spouse 1); **S2** (Spouse 2)
[2] **S1** (Spouse 1); **S2** (Spouse 2)
[3] **P** (permanent); **T** (term); **G** (group term)
[4] **S1** (Spouse 1); **S2** (Spouse 2)

VI. THE KEY PEOPLE IN YOUR ESTATE PLAN

When we meet, we will discuss appropriate choices for executors, trustees, and other agents under your estate planning documents. Your selections will be among the most critical decisions you will make in your estate planning. A helpful starting point for our discussion will be your initial inclinations as to the persons who might fill these roles. While spouses do not necessarily have to choose the same persons, it is preferable in most cases. In those situations where you wish to make different choices, sufficient space has been left in the table below for this purpose. **Please include formal names and a current city and state for the persons you select. For persons listed as Agents under Advance Medical Directive, also list cell phone numbers.**

	1st Choice	2nd Choice	3rd Choice
Executor(s)[1]			
Trustee(s)[2]			
Agent(s) under Financial Power of Attorney[3]			
Agent(s) under Advance Medical Directive[4]			
Guardian(s) for your Minor Children[5]			

[1] Someone to settle your estate upon your death. This can be your spouse, adult children, other family members, trusted friends or a professional executor, such as an attorney or a bank.
[2] Someone to administer any trusts you may establish during your life or upon your death. This can be your spouse, adult children, other family members, trusted friends or a professional trustee, such as an attorney or bank.
[3] Someone to handle your financial and administrative affairs for you if you become incapacitated.
[4] Someone to make health and medical treatment decisions for you if you become incapacitated.
[5] Someone to raise your children if both Spouse 1 and Spouse 2 die while any child is under 18.

VII. QUESTIONS FOR YOU

#	Question	Yes	No
1	Has either Spouse 1 or Spouse 2 been previously married?[1]	☐	☐
2	Have Spouse 1 and Spouse 2 signed a pre-marital or post-marital agreement?	☐	☐
3	Is either Spouse 1 or Spouse 2 citizens of a country **other** than the United States?	☐	☐
4	Are any of your children adopted?	☐	☐
5	Do you have a deceased child?	☐	☐
6	Do you have any beneficiaries with physical or mental disabilities?	☐	☐
7	Do you own assets jointly with any person other than your spouse?[2]	☐	☐
8	Do you own an interest in a closely held business?[3]	☐	☐
9	Are you the beneficiary of a trust created by someone else?	☐	☐
10	Do you have any existing wills, trusts, or other estate planning documents?	☐	☐
11	Have you ever lived in a community property state? If yes, circle: AZ, CA, ID, LA, NV, NM, TX, WA, WI.	☐	☐
12	Do you own real property outside Virginia?	☐	☐
13	Have you made gifts in excess of $10,000 in value to any person in any single year?	☐	☐
14	Are you interested in making gifts at death to any tax-exempt organization?	☐	☐
15	Do you anticipate major changes in assets, liabilities or income in the next few years?	☐	☐
16	Are you concerned about the safety of any adult beneficiary's inheritance due to the beneficiary's serious marital or financial instability?	☐	☐
17	Do you own any insurance on the life of another person?	☐	☐
18	Is there any person who is financially dependent upon you other than your children?	☐	☐
19	Do you or any family member have any significant health issues or disabilities?	☐	☐
20	Is there a Transfer on Death Deed on any existing real estate that you own?	☐	☐
21	Do you have a pet that would need to be re-homed or otherwise provided for in the event of your death?	☐	☐
22	Is there any additional information or concerns about which you think your attorney should know? If so, please explain on the following page.	☐	☐

[1] If yes, please indicate on the following page when the marriage ended and whether there are any current obligations to pay child support, spousal support or maintain life insurance.
[2] If yes, please describe on the following page the joint ownership, including the name of the joint owner(s) the asset, and the percentage owned.
[3] If yes, please specify on the following page what type of business (e.g., C Corporation, S Corporation, Limited Liability Company, etc.), and the percentage owned.

VIII. YOUR PROFESSIONAL ADVISORS

Accountant	
Investment Advisor / Financial Planner	
Life Insurance Agent	
Family Doctor	
Other	

Would you like us to send copies of any estate planning documents you may sign to your investment advisor or any other financial professional? YES ☐ NO ☐

If yes, please include name, address, and email address in the space below:

IX. YOUR COMMENTS

Question No.	Comments
	Location of Second Residence or other Real Estate Identified in Section III 1. 2. 3.

X. CONSENT TO JOINT REPRESENTATION

We are often asked to represent both parties to a marriage in the preparation of wills, trusts, and other estate planning documents. The law recognizes that there are good and valid reasons for a married couple to have the same attorney work with them in their estate planning. Some of these reasons - cost, efficiency, unity through marriage - are self-evident.

We believe we can provide competent and diligent representation to both of you. The Virginia Rules of Professional Conduct suggest that an attorney who represents both Spouse 1 and Spouse 2 in estate planning should obtain both parties' informed consent to the joint representation and that your consent be memorialized in writing. This is the purpose of this portion of the questionnaire.

You may have differing, and sometimes conflicting, interests and objectives. If each of you had a separate attorney, information you gave to your attorney would be confidential and could not be obtained by your spouse without your consent. However, if we serve as an attorney for both of you, we cannot have a private consultation with just one of you without the understanding that we can share any information that one of you gives us with the other one.

If you ask us to serve you jointly, our goal will be to work with both of you to develop a coordinated plan and to encourage the resolution of any differing interests in an equitable manner that will be in your mutual best interests.

By initialing in Section I of this questionnaire you assent to the following:

1. You have read this document.

2. You realize that there are areas where your interests and objectives may differ in connection with your estate planning and related matters. You understand that either of you may retain separate counsel in connection with these matters.

3. You ask that the law firm of Virginia Wills, Trusts & Estates PLC represent both of you in connection with your estate planning and that you both consent to that dual representation.

4. You understand and agree that communications and information Virginia Wills, Trusts & Estates PLC receives from either one of you may be shared with the other.

OUR BILLING PRACTICES

As part of the estate planning process, we generally:

1. Review and discuss your current estate planning documents, personal financial statement, retirement death benefits, and life insurance policies.
2. Recommend and prepare a new or altered estate plan that typically includes a last will and testament, a revocable living trust, a durable financial power of attorney, and an advance medical directive.
3. Supervise and participate in the execution of new estate planning documents.
4. Recommend beneficiary designation changes appropriate to the new estate plan and changes in asset ownership, if necessary.

Whenever it is practical to do so, we prepare estate planning documents for a fixed fee, as opposed to hourly billing. This fee reflects (i) the value of the services provided, (ii) the level of expertise required, and (iii) the anticipated time and effort involved on our part. We are usually able to provide clients with a "not-higher than" fee quote at the conclusion of our first meeting. In certain cases, a fixed fee may not be a practical option. Some clients may want us to assist them in ways that go beyond the scope of the services outlined above. Under those circumstances, we will discuss hourly rate billing with the client and provide our then current rates.

If your estate planning documents are not executed within six months after the delivery of the drafts, your file may be transferred to inactive status. In that situation, we reserve the right to bill the agreed-upon fee and we will not send out any further reminders about completing the estate planning process. Of course, you may reactivate the estate planning project later on, and we will be glad to see it through to completion.

WARNING REGARDING DATA SECURITY

Unless you specifically indicate to the contrary, we shall assume that we may use voicemail, email, text-messaging, the Internet, and other electronic means to communicate with you or on your behalf. We may also use the cloud or other internet-based or electronic storage of materials contained in your file on a temporary or permanent basis.

You should understand that the use of these means of communication and information storage may increase the risk of an inadvertent disclosure of confidential information. We will make reasonable efforts and take reasonable precautions to prevent unauthorized disclosure of any of your confidential information. Please inform your attorney promptly if you do not want us to use these forms of communication and information storage in your case.

If you use your workplace computer for personal matters, it is likely that your employer has policies that allow others to have access to your information. Therefore, you should avoid using your workplace computer for sensitive communications and the storage of sensitive information.

USE OF ARTIFICIAL INTELLIGENCE TOOLS

As part of our representation, we may use artificial intelligence ("AI"), to assist with legal research, document review, due diligence, and drafting. These tools supplement, but never replace, the professional judgment of our attorneys. All AI-assisted work product is independently reviewed and verified by an attorney before it is relied upon or provided to you.

We use only AI tools that (a) are governed by a written agreement prohibiting the vendor from using client data to train or improve underlying models, (b) do not retain client data beyond what is reasonably necessary to perform the requested task, and (c) meet our firm's data security standards. Confidential client information will not be entered into free, consumer-facing, or public AI platforms that lack these contractual protections.

Please let us know at any time if you have questions about our use of AI tools or would like to know which specific tools are being used on your matter.

Consistent with Virginia Legal Ethics Opinion 1901, our fees reflect the skill, judgment, and results we bring to your matter — not merely the time a task takes. Where we bill hourly, we bill only for actual time spent, regardless of any efficiency AI provides. Where we bill on a flat or value basis, the use of AI to complete a task more efficiently does not by itself reduce the agreed fee, though we remain bound to charge only reasonable fees that are disclosed to our clients. There are no separate charges for the use of AI tools beyond the fee discussed above.