



McDONALD LAW FIRM, LLC

Helping Preserve Your Family's Legacy

Long-Term Care Planning Worksheet

Using this organizer will assist us in designing an estate plan that meets your goals. All information provided is strictly confidential. If possible, please return the completed worksheet to our office prior to your appointment via mail or fax.

PLEASE READ BEFORE COMPLETING THIS FORM!!

This is a fillable PDF which means that you can type directly into the form. You may also print the form and complete it by hand. Please follow the instructions below based on how you will complete the form.

IF COMPLETING THE FORM ON A COMPUTER:

NOTE: Please download the form onto your computer prior to completing the form. Once the form is downloaded onto your computer, you may complete the form (to the best of your ability) in one session or you may save the form and complete the form at your convenience. After completing the form, you may print the form as if you are printing any other document from your computer.

IF COMPLETING THE FORM BY HAND:

NOTE: Please download the form onto your computer and print the form. Once the form is printed, please complete the form, to the best of your ability, with either a blue or black ink pen.

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CONFIDENTIAL
LONG-TERM CARE PLANNING QUESTIONNAIRE

This questionnaire is designed to help us gather the information necessary to properly plan to protect your assets (or the assets of a family member or friend) during a time when there may be a need for Long-Term Care. Whether you are a new or an established client, we have found this questionnaire extremely helpful and we ask your indulgence in completing it fully. Those questions that do not apply to you, your family, or your financial situation may simply be ignored. Please feel free to attach additional pages where space is insufficient, or to provide other information you feel is relevant.

DATE: _____

SECTION 1. NAME AND CONTACT INFORMATION

Person Completing Form: _____
(first) (middle) (last)

Home Address: _____

Relationship to Client: _____

Client's Full Name: _____
(first) (middle) (last)

Spouse's Full Name: _____
(first) (middle) (last)

Home Address: _____

Client

Spouse

Telephone Numbers: _____
(home) (home)

_____ (cell) (cell)

Date of Birth: _____

Former/Maiden Names: _____

US Citizen: [] Yes [] No [] Yes [] No

Social Security Number: _____

Military Service: _____

Date of Death: _____

SECTION 2. MARITAL INFORMATION

A. Date of Marriage: _____

B. Place of Marriage: _____
(city) (state or province) (country)

C. Client's Former Spouses:

1. _____
(name of former spouse) (date of marriage) (place of marriage)

_____ ☐ Death ☐ Divorce
(year terminated) (how terminated)

☐ Yes ☐ No
(still living?) (if still living, describe relationship)

2. _____
(name of former spouse) (date of marriage) (place of marriage)

_____ ☐ Death ☐ Divorce
(year terminated) (how terminated)

☐ Yes ☐ No
(still living?) (if still living, describe relationship)

3. _____
(name of former spouse) (date of marriage) (place of marriage)

_____ ☐ Death ☐ Divorce
(year terminated) (how terminated)

☐ Yes ☐ No
(still living?) (if still living, describe relationship)

D. Spouse's Former Spouses:

1. _____
(name of former spouse) (date of marriage) (place of marriage)

_____ ☐ Death ☐ Divorce
(year terminated) (how terminated)

☐ Yes ☐ No
(still living?) (if still living, describe relationship)

2. _____
(name of former spouse) (date of marriage) (place of marriage)

_____ ☐ Death ☐ Divorce
(year terminated) (how terminated)

☐ Yes ☐ No
(still living?) (if still living, describe relationship)

3. _____
(name of former spouse) (date of marriage) (place of marriage)

_____ ☐ Death ☐ Divorce
(year terminated) (how terminated)

☐ Yes ☐ No
(still living?) (if still living, describe relationship)

SECTION 3. CHILDREN

List all children. Copy and attach additional pages, if needed.

Total number of children: _____

1. _____
(name of child) (date of birth) (social security number)

Parent: ☐ Client ☐ Spouse ☐ Both

(current address) (phone number)

☐ **Adopted** _____
(date of adoption) (court granting adoption)

☐ **Deceased** _____ ☐ **Yes** ☐ **No**
(date of death) (child has surviving children?)

(Describe this child -- does he or she have "special needs"? Consider health and general financial status, including needs and abilities)

(Use additional pages, if needed)

2. _____
(name of child) (date of birth) (social security number)

Parent: ☐ Client ☐ Spouse ☐ Both

(current address) (phone number)

☐ **Adopted** _____
(date of adoption) (court granting adoption)

☐ **Deceased** _____ ☐ **Yes** ☐ **No**
(date of death) (child has surviving children?)

(Describe this child -- does he or she have "special needs"? Consider health and general financial status, including needs and abilities)

(Use additional pages, if needed)

3. _____
(name of child) (date of birth) (social security number)

Parent: ☐ Client ☐ Spouse ☐ Both

(current address) (phone number)

☐ **Adopted** _____
(date of adoption) (court granting adoption)

☐ **Deceased** _____ ☐ **Yes** ☐ **No**
(date of death) (child has surviving children?)

(Describe this child -- does he or she have "special needs"? Consider health and general financial status, including needs and abilities)

(Use additional pages, if needed)

4. _____
(name of child) (date of birth) (social security number)

Parent: ☐ Client ☐ Spouse ☐ Both

(current address) (phone number)

☐ Adopted _____
(date of adoption) (court granting adoption)

☐ Deceased _____ ☐ Yes ☐ No
(date of death) (child has surviving children?)

(Describe this child -- does he or she have "special needs"? Consider health and general financial status, including needs and abilities)

(Use additional pages, if needed)

5. _____
(name of child) (date of birth) (social security number)

Parent: ☐ Client ☐ Spouse ☐ Both

(current address) (phone number)

☐ Adopted _____
(date of adoption) (court granting adoption)

☐ Deceased _____ ☐ Yes ☐ No
(date of death) (child has surviving children?)

(Describe this child -- does he or she have "special needs"? Consider health and general financial status, including needs and abilities)

(Use additional pages, if needed)

6. _____
(name of child) (date of birth) (social security number)

Parent: ☐ Client ☐ Spouse ☐ Both

(current address) (phone number)

☐ Adopted _____
(date of adoption) (court granting adoption)

☐ Deceased _____ ☐ Yes ☐ No
(date of death) (child has surviving children?)

(Describe this child -- does he or she have "special needs"? Consider health and general financial status, including needs and abilities)

(Use additional pages, if needed)

SECTION 4. DISPOSITIVE PLANNING

In general, to whom and how do you want your property distributed upon your death? Think about your family members, friends, former benefactors, and charities, such as public benefit nonprofit organizations, educational or religious organizations. ***Please note that we expect that this will be completed during our first conference with you regarding estate planning. You may want to use this section as items to consider before our conference.***

Consider to whom your property should go if your first-choice beneficiaries do not survive you, or - if your property is left in Trust - if they do not survive until complete distribution is made (i.e., charities, other siblings, spouse of child, etc.).

A. First-choice beneficiaries: ☐ Spouse ☐ Children ☐ Spouse and Children ☐ Other

B. Second-choice beneficiaries: ☐ Spouse ☐ Children ☐ Spouse and Children ☐ Other

C. Third-choice beneficiaries: ☐ Spouse ☐ Children ☐ Spouse and Children ☐ Other

D. Any specific disposition of your residence?

E. Any specific gifts of special articles, such as art or jewelry?

F. Any specific disposition of household and personal effects?

G. Other information you think is important to your estate planning:

SECTION 5. FIDUCIARIES

Please consider the who you want to handle your affairs when you cannot. ***We will discuss this section at our conference and will assist you with the completion.***

A. EXECUTORS (Co-Executors Act: ☐ Separately or ☐ Jointly)

1. _____
(name) (relationship)

(current address) (phone number)
2. _____
(name) (relationship)
☐ Co-Executor with Previous Name (May surviving Co-Executor act alone? ☐ Yes ☐ No)
or ☐ Successor Executor

(current address) (phone number)
3. _____
(name) (relationship)
☐ Co-Executor with Previous Name (May surviving Co-Executor act alone? ☐ Yes ☐ No)
or ☐ Successor Executor

(current address) (phone number)
4. _____
(name) (relationship)
☐ Co-Executor with Previous Name (May surviving Co-Executor act alone? ☐ Yes ☐ No)
or ☐ Successor Executor

(current address) (phone number)

B. TRUSTEES (Co-Trustees Act: ☐ Separately or ☐ Jointly)

1. _____
(name) (relationship)

(current address) (phone number)
2. _____
(name) (relationship)
☐ Co-Trustee with Previous Name (May surviving Co-Trustee act alone? ☐ Yes ☐ No)
or ☐ Successor Trustee

(current address) (phone number)

3. _____
(name) (relationship)
[] Co-Trustee with Previous Name (May surviving Co-Trustee act alone? [] Yes [] No)
or [] Successor Trustee

(current address) (phone number)

4. _____
(name) (relationship)
[] Co-Trustee with Previous Name (May surviving Co-Trustee act alone? [] Yes [] No)
or [] Successor Trustee

(current address) (phone number)

C. GUARDIANS OF MINOR CHILDREN (Co-Guardians Act: [] Separately or [] Jointly)

1. _____
(name) (relationship)

(current address) (phone number)

2. _____
(name) (relationship)
[] Co-Guardian with Previous Name (May surviving Co-Guardian act alone? [] Yes [] No)
or [] Successor Guardian

(current address) (phone number)

3. _____
(name) (relationship)
[] Co-Guardian with Previous Name (May surviving Co-Guardian act alone? [] Yes [] No)
or [] Successor Guardian

(current address) (phone number)

4. _____
(name) (relationship)
[] Co-Guardian with Previous Name (May surviving Co-Guardian act alone? [] Yes [] No)
or [] Successor Guardian

(current address) (phone number)

D. AGENTS UNDER POWER OF ATTORNEY (Co-Agents Act: ☐ Separately or ☐ Jointly)

1. _____
(name) (relationship)

(current address) (phone number)

2. _____
(name) (relationship)
☐ Co-Agent with Previous Name (May surviving Co-Agent act alone? ☐ Yes ☐ No)
or ☐ Successor Agent

(current address) (phone number)

3. _____
(name) (relationship)
☐ Co-Agent with Previous Name (May surviving Co-Agent act alone? ☐ Yes ☐ No)
or ☐ Successor Agent

(current address) (phone number)

4. _____
(name) (relationship)
☐ Co-Agent with Previous Name (May surviving Co-Agent act alone? ☐ Yes ☐ No)
or ☐ Successor Agent

(current address) (phone number)

E. AGENTS UNDER HEALTH CARE POWER OF ATTORNEY

1. _____
(name) (relationship)

(current address) (phone number)

2. _____
(name) (relationship)

(current address) (phone number)

3. _____
(name) (relationship)

(current address) (phone number)

4. _____
(name) (relationship)

(current address) (phone number)

SECTION 6. HEALTH-RELATED PROBLEMS

Please describe any specific health-related problems.

A. Client

B. Spouse

SECTION 7. CAPACITY

A. MEMORY AND UNDERSTANDING

Are there any known problems with memory or understanding?

Client: [] Yes [] No

Spouse: [] Yes [] No

If yes, please explain:

B. OTHER ISSUES

	<u>Client</u>	<u>Spouse</u>
Able to sign name?:	[] Yes [] No	[] Yes [] No
Able to speak?:	[] Yes [] No	[] Yes [] No
Able to recognize friends and family?:	[] Yes [] No	[] Yes [] No
Cognizant of property and possessions?:	[] Yes [] No	[] Yes [] No
Able to leave current residence?:	[] Yes [] No	[] Yes [] No

SECTION 8. PHYSICIAN INFORMATION

Please list the name, specialty, address, and phone number of your primary physician.

<u>Client</u>	<u>Spouse</u>
Physician's Name: _____	_____
Specialty: _____	_____
Address: _____	_____
_____	_____
Business Phone: _____	_____

SECTION 9. RESIDENCE -- OWNED

A. Owners: _____

B. How is title held? _____

PLEASE PROVIDE A COPY OF THE DEED AND MOST RECENT TAX BILL

C. Fair Market Value: \$ _____

D. Mortgage Balance: \$ _____

Is it a Reverse Annuity Mortgage (RAM)? ☐ Yes ☐ No

Basic Mortgage Terms: _____

E. Single Family Residence? ☐ Yes ☐ No

F. If the property is rental property, please provide the following:

1. Number of units: _____
2. Currently being rented? ☐ Yes ☐ No
3. Are tenants under lease? ☐ Yes ☐ No

G. If the property was purchased, please provide the following:

1. Date of Purchase: _____
2. Purchase Price: \$ _____

H. If the property was inherited, please provide the following:

1. Month/Year Inherited: _____
2. Value when Inherited: \$ _____

I. If improvements have been made to the property, please detail the value and nature of them:

J. Have the owners used the capital gains tax exclusion? ☐ Yes ☐ No

K. If at least one occupant of the residence is a child of the individual in need of long-term care, has that child lived in the residence for at least 2 years? ☐ Yes ☐ No

1. If yes, has the child provided personal care to the parent that might have delayed the need for long-term care for the parent? ☐ Yes ☐ No

2. If so, please describe the nature and duration of the care provided:

L. Does the person needing care have any living children who are disabled? ☐ Yes ☐ No

If yes, please describe the nature of the disability:

M. Does the owner have a sibling who has lived in the house for at least 1 year? ☐ Yes ☐ No

If yes, does the sibling still reside in the home? ☐ Yes ☐ No

SECTION 10. RESIDENCE -- RENTED

A. Monthly Rent: \$

B. Type of Rental: ☐ Single Family ☐ Apartment ☐ Residential Care
☐ Life Care ☐ Senior Housing

C. Rental/Lease Agreement? ☐ Yes ☐ No

D. Is Rent Subsidized? ☐ Yes ☐ No

If so, by whom and amount?

SECTION 11. LONG-TERM CARE (LTC)

A. Client

Currently Receiving LTC? [] Yes [] No

If so, date started: _____

Name of Facility/Provider: _____

Address: _____

Business Phone: _____

Administrator or Contact: _____

B. Spouse

Currently Receiving LTC? [] Yes [] No

If so, date started: _____

Name of Facility/Provider: _____

Address: _____

Business Phone: _____

Administrator or Contact: _____

SECTION 12. HOSPITAL

A. Client

Currently in Hospital? [] Yes [] No

If so, date admitted: _____

Name/location of hospital: _____

Description of medical issue: _____

Is LTC placement expected? [] Yes [] No

If so, likely to return home? [] Yes [] No

B. SpouseCurrently in Hospital? ☐ Yes ☐ No

If so, date admitted: _____

Name/location of hospital: _____

Description of medical issue: _____

Is LTC placement expected? ☐ Yes ☐ NoIf so, likely to return home? ☐ Yes ☐ No**SECTION 13. INCOME**

In completing the following section, use the “name on the check” rule; that is, the person whose name appears on the payment vehicle is the “owner” of the income.

A. FIXED MONTHLY INCOME

	<u>Client</u>	<u>Spouse</u>	<u>Joint</u>
1. Social Security:	\$ _____	\$ _____	\$ _____
2. R.R. Retirement:	\$ _____	\$ _____	\$ _____
3. Pension:	\$ _____	\$ _____	\$ _____
4. _____:	\$ _____	\$ _____	\$ _____
5. _____:	\$ _____	\$ _____	\$ _____
6. _____:	\$ _____	\$ _____	\$ _____

B. NON-FIXED MONTHLY INCOME

	<u>Client</u>	<u>Spouse</u>	<u>Joint</u>
1. Interest:	\$ _____	\$ _____	\$ _____
2. Dividends:	\$ _____	\$ _____	\$ _____
3. _____:	\$ _____	\$ _____	\$ _____
4. _____:	\$ _____	\$ _____	\$ _____
5. _____:	\$ _____	\$ _____	\$ _____

C. TOTALS (A thru B): \$ _____ \$ _____ \$ _____

SECTION 14 ASSETS AND RESOURCES

A. CASH AND BANK ACCOUNTS (CDs, Checking, Savings, etc.)

(Please provide copies of statements)

<u>Name of Bank/Branch</u>	<u>Account No.</u>	<u>Type of Account</u>	<u>Balance/Value</u>	<u>How Title Held</u>
<u>Big Bank/Main St.</u> (sample)	<u>xxx-xxxx</u>	<u>Savings</u>	<u>\$ xx,xxx.xx</u>	<u>Jointly w/ son</u>
_____	_____	_____	<u>\$</u> _____	_____
_____	_____	_____	<u>\$</u> _____	_____
_____	_____	_____	<u>\$</u> _____	_____
_____	_____	_____	<u>\$</u> _____	_____
_____	_____	_____	<u>\$</u> _____	_____

B. SECURITIES (Bonds, Marketable Securities, etc.)

(Please provide copies of statements)

<u>Name of Company</u>	<u>Type of Sec.</u>	<u># Shares/Face Val.</u>	<u>Cost</u>	<u>Current Val.</u>	<u>How Title Held</u>
<u>Acme Corp.</u> (sample)	<u>Common</u> (or Preferred)	<u>xx Shares</u>	<u>\$ x,xxx.xx</u>	<u>\$ x,xxx.xx</u>	<u>Sole owner</u>
_____	_____	_____	<u>\$</u> _____	<u>\$</u> _____	_____
_____	_____	_____	<u>\$</u> _____	<u>\$</u> _____	_____
_____	_____	_____	<u>\$</u> _____	<u>\$</u> _____	_____
_____	_____	_____	<u>\$</u> _____	<u>\$</u> _____	_____
_____	_____	_____	<u>\$</u> _____	<u>\$</u> _____	_____

C. RETIREMENT ACCOUNTS (IRAs, Keoghs, etc.)

(Please provide copies of statements and beneficiary designations)

<u>Name of Institution</u>	<u>Account No.</u>	<u>Owner</u>	<u>Beneficiary</u>	<u>Date Est.</u>	<u>Current Value</u>
<u>Big Broker</u> (sample)	<u>xxx-xxxx</u>	<u>Client</u>	<u>Spouse</u>	<u>Jan, 1970</u>	<u>\$ xx,xxx.xx</u>
_____	_____	_____	_____	_____	<u>\$</u> _____
_____	_____	_____	_____	_____	<u>\$</u> _____
_____	_____	_____	_____	_____	<u>\$</u> _____
_____	_____	_____	_____	_____	<u>\$</u> _____
_____	_____	_____	_____	_____	<u>\$</u> _____

D. REAL ESTATE**(Please provide copies of deeds and most recent tax bills)**

<u>Description (Location)</u>	<u>Cost (Basis)</u>	<u>Market Value</u>	<u>Mortgage Bal.</u>	<u>How Title Held</u>
123 Know Way (sample)	\$ xxx,xxx.xx	\$ xxx,xxx.xx	\$ xx,xxx.xx	Joint tenant
_____	\$ _____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	\$ _____	_____

E. PERSONAL PROPERTY

	<u>Market Value</u>	<u>How Title Held</u>
Home Furnishings: \$ _____	_____	_____
Cars, RVs, Boats, etc.: \$ _____	_____	_____
Jewels, Furs, etc.: \$ _____	_____	_____
_____ : \$ _____	_____	_____
(other: collectibles, etc.)		
_____ : \$ _____	_____	_____
_____ : \$ _____	_____	_____

F. BUSINESS INTERESTS

If the person needing long-term care has any business interests, please provide a short description giving the name, location, percentage owned, names and relationship of co-owners, and the form of ownership (i.e., sole proprietorship, closely held corporation, partnership, etc.). Please bring a copy of any agreements, financial statements, etc.

G. RIGHTS OR INTERESTS IN TRUSTS, ESTATES, OR PROSPECTIVE INHERITANCES

Briefly describe or give the name of the Trust in which the person needing long-term care has an interest, or the person who is the source of the inheritance. Please provide a copy of the instrument which creates the interest, if available. If not, please advise how we may obtain a copy.

H. MISCELLANEOUS

If the person needing long-term care has any property interests not described above, please explain the nature of the interests and the estimated value of each (but not life insurance—see Section 20).

SECTION 15. EXEMPT RESOURCES

Under the Medicaid rules, certain items are “exempt” from consideration as an available asset to pay for long-term care. Some of those items are listed below. Please indicate whether the person needing care has the listed items.

	<u>Client</u>	<u>Spouse</u>
Burial plot:	[] Yes [] No	[] Yes [] No
Irrevocable burial fund contract:	[] Yes [] No	[] Yes [] No

SECTION 16. PEOPLE PROVIDING ASSISTANCE

Who now has “assistance” responsibilities? That is, are any family members or other people providing custodial or other types of care to the person needing assistance? Please list name, phone number, and relationship to the person receiving the care.

A. Responsible for Client:

1. _____
(name of responsible person) (phone number) (relationship to person needing care)
2. _____
(name of responsible person) (phone number) (relationship to person needing care)
3. _____
(name of responsible person) (phone number) (relationship to person needing care)

B. Responsible for Spouse:

1. _____
(name of responsible person) (phone number) (relationship to person needing care)
2. _____
(name of responsible person) (phone number) (relationship to person needing care)
3. _____
(name of responsible person) (phone number) (relationship to person needing care)

SECTION 17. UNAVAILABLE CHILDREN

If the person needing care has any children who are not to be relied upon to help with management or other needs of the parent, please list those children here and briefly explain why you believe they should not be relied upon.

SECTION 18. MONTHLY COST OF LIVING

A. HOUSING (ESTIMATED PER MONTH)

- | | <u>Client</u> | <u>Spouse</u> | <u>Joint</u> |
|---|----------------------|----------------------|---------------------|
| 1. If home is owned, total cost of mortgage, taxes, utilities, phone, etc.*: \$ | _____ | \$ _____ | \$ _____ |
| 2. If home is rented, total rent, including maint. fees, if any: \$ | _____ | \$ _____ | \$ _____ |

- * Is the senior citizen real property tax exemption being used? ☐ Yes ☐ No
Is the veteran's real property tax exemption being used? ☐ Yes ☐ No

B. INSURANCE PREMIUMS (PER MONTH)

	<u>Client</u>	<u>Spouse</u>	<u>Joint</u>
1. Health insurance:	\$ _____	\$ _____	\$ _____
2. Long-term care insurance:	\$ _____	\$ _____	\$ _____
3. _____ : (specify)	\$ _____	\$ _____	\$ _____
4. _____ : (specify)	\$ _____	\$ _____	\$ _____

C. MEDICAL EXPENSES (ESTIMATED PER MONTH)

	<u>Client</u>	<u>Spouse</u>	<u>Joint</u>
1. Non-covered medications:	\$ _____	\$ _____	\$ _____
2. _____ : (specify)	\$ _____	\$ _____	\$ _____
3. _____ : (specify)	\$ _____	\$ _____	\$ _____

D. BASIC LIVING EXPENSES (ESTIMATED PER MONTH)

	<u>Client</u>	<u>Spouse</u>	<u>Joint</u>
1. Food:	\$ _____	\$ _____	\$ _____
2. Entertainment and travel:	\$ _____	\$ _____	\$ _____
3. Support for children:	\$ _____	\$ _____	\$ _____
4. _____ : (specify)	\$ _____	\$ _____	\$ _____
5. _____ : (specify)	\$ _____	\$ _____	\$ _____
E. TOTALS (A thru D):	\$ _____	\$ _____	\$ _____

SECTION 19. HEALTH AND LTC INSURANCE

If the person needing care has Medicare Parts A, B, or D, private health or long-term care insurance, or is paying for a Medicare supplement policy, please provide the following information:

<u>Name of Insurer</u>	<u>Policy No.</u>	<u>Type of Policy</u>	<u>Monthly Prem.</u>	<u>If LTC, Daily Benefit</u>
Acme Insurance (sample)	123-45-6789	Long-term care	\$ 3,000	\$ 300.00 per day
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____

SECTION 20. LIFE INSURANCE

If the person needing care has life insurance, please provide the following information:

<u>Name of Insurer</u>	<u>Policy No.</u>	<u>Type of Policy</u>	<u>Monthly Prem.</u>	<u>Cash Surrender Value</u>
Acme Insurance (sample)	123-45-6789	Whole Life	\$ 1,000	\$ 10,000
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____

SECTION 21. PLANNING AND OTHER DOCUMENTS

Please provide a copy of each document.

	<u>Client</u>	<u>Spouse</u>
Will:	[] Yes [] No	[] Yes [] No
Revocable Living Trust:	[] Yes [] No	[] Yes [] No
Pour-Over Will:	[] Yes [] No	[] Yes [] No
General Durable Power of Attorney:	[] Yes [] No	[] Yes [] No
Health Care Power of Attorney (or Proxy):	[] Yes [] No	[] Yes [] No
Living Will:	[] Yes [] No	[] Yes [] No
_____:	[] Yes [] No	[] Yes [] No
_____:	[] Yes [] No	[] Yes [] No
_____:	[] Yes [] No	[] Yes [] No

(specify)

SECTION 22. TRANSFERS WITHIN 60 MONTHS

Has the person needing care (or his or her spouse) gratuitously transferred property to someone other than transferor's spouse within the past 60 months? If so, please provide the following information and **copies of gift tax returns, if available**: Please include transfers for financial assistance to anyone, other than in exchange for work.

A. Client

<u>Recipient</u>	<u>Amount/Value of Gift</u>	<u>Date of Gift</u>
1. _____	\$ _____	_____
2. _____	\$ _____	_____

3. _____ \$ _____

4. _____ \$ _____

B. Spouse

<u>Recipient</u>	<u>Amount/Value of Gift</u>	<u>Date of Gift</u>
1. _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____
4. _____	\$ _____	_____

SECTION 23. TRANSFERS TO OR FROM TRUSTS

Has the person needing care (or his or her spouse) transferred property into a Trust—like an Irrevocable Life Insurance Trust (ILIT)—or directed that property be transferred from a Trust (usually a Revocable Trust) within the past 60 months? If so, please provide the following information:

A. Client

<u>Name of Trust</u>	<u>Amount/Value of Transfer</u>	<u>Date of Transfer</u>
1. _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____

B. Spouse

<u>Name of Trust</u>	<u>Amount/Value of Transfer</u>	<u>Date of Transfer</u>
1. _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____

SECTION 24. CLIENT'S GOALS

What are your goals?

PRIVACY STATEMENT

In the course of providing our clients with income tax, estate tax, gift tax, business planning and financial advice, we receive private, non-public information. We collect this information directly from you and from other service providers, when authorized by you to do so. It is our policy that any information, particularly financial information and sensitive personal information provided by you or your agents to us for purposes of our business relationship, is to be disclosed only under the following conditions:

Our Staff. Employees of our office may need such information to conduct or conclude a transaction for which you have engaged our services. Access to client information is strictly limited to the specific items needed to perform that services you may require.

Outside Service Contractors. In the course of providing services that you request, an outside service might be used to evaluate your financial, insurance, investing, or tax options. We insist that any such information needed by outside firms for business purposes must be considered confidential. We notify those outside sources that this business policy must be honored and such service providers are responsible for honoring Federal Trade Commission regulations.

Others, by Client Request. If you ask us to work with one of your advisors, you must expect us to share pertinent information to complete the tasks you require of us.

Security. We maintain physical, electronic and procedural guidelines and safeguards that comply with federal regulations to guard clients' private, personal information (in fact, ***all*** information you give us is handled in such a manner.)

New provisions from the Federal Trade Commission require is to notify you that this is our policy and that you have the right to keep non-public, personal information private by notifying us that this is your request. Regardless of the FTC requirements and even if you never request us to keep your non-public information private, we will do so, under the conditions listed above. This has always been our policy, not only in respect to Federal Trade Commission requirements, but also to comply with our moral and ethical responsibilities to you. If you have any questions, whatsoever, please do not hesitate to call me or our Director Client Services.

Sincerely,

Andre McDonald

Andre O. McDonald, Esq.

ACKNOWLEDGMENT OF PRIVACY STATEMENT

I have read and understand the explanation titled “Privacy Policy” regarding non-public personal information I may supply and the federal trade commission regulations. By signing this acknowledgment, you agree to the terms stated. You may notify us at any time that you do not want us to disclose your personal information to particular financial advisors or helpers, even though you have previously given us permission to do so. If so, please let us know in writing, and we will honor your request.

Client's- Signature
