



LSPN
— PRO —

PLANNING QUESTIONNAIRE

If any of these questions apply to you, please contact one of our representatives to review them with you. Some situations will require custom planning and others can still get simple planning but may need some additional instructions/services.

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- Were you or your spouse previously married and/or have children from a previous relationship?
 - Are you or your spouse a non-citizen of the United States? Is anyone that you want to appoint as a Trustee or beneficiary a non-citizen of the United States?
 - Do you have a beneficiary that is receiving disability or Medicaid Assistance?
 - Do you have a beneficiary that will require guardianship or special supervision as an adult?
 - Is your selected guardian for minor children living outside of the U.S.?
 - Do you have a professional license that requires extra asset protection?
 - Do you own any property outside of the United States or on tribal lands?
 - Do you currently own a business or plan to own a business soon?
 - Do you own rental or investment property?
 - Do you own any NFA or collectable firearms?
 - Do you own any intellectual property such as patents, copyrights, or trademarks?
 - Do you wish to include planning to qualify for Medicaid/MediCal, or Veteran Benefits?
 - Does your plan have a substantial part of your estate going to Charity or Non-Profit?
 - Do you have heirlooms, collectables, or other expensive assets that require special planning?
 - Is your estate over \$5 Million or do you need to have comprehensive tax planning as part of your estate plan to avoid estate and income taxes to your beneficiaries?