

---

## **SUCCESSION QUESTIONNAIRE**

**Date:** \_\_\_\_\_

**\*\* Submit the following documents to attorney along with this questionnaire: \*\***

- (1) Official death certificate
- (2) Property description for all real estate owned by decedent
- (3) Original vehicle titles for all vehicles owned by decedent
- (4) Original Last Will and Testament of the decedent

**\*\* FOR ALL NAMES: Include MIDDLE NAMES as well as MAIDEN NAMES. Failure to include this information will cause a delay in drafting your documents. \*\***

### **A. Family**

| <b>Decedent (person who died)</b> |  | <b>Spouse</b>                  |  |
|-----------------------------------|--|--------------------------------|--|
| NAME:                             |  | NAME:                          |  |
| STREET ADDRESS:                   |  | STREET ADDRESS:                |  |
| CITY, STATE, ZIP:                 |  | CITY , STATE, ZIP:             |  |
| PARISH OF RESIDENCE:              |  | PARISH OF RESIDENCE:           |  |
| HOME PHONE:                       |  | HOME PHONE:                    |  |
| BUSINESS PHONE:                   |  | BUSINESS PHONE:                |  |
| CELL PHONE:                       |  | CELL PHONE:                    |  |
| OCCUPATION:                       |  | OCCUPATION:                    |  |
| BIRTH DATE:                       |  | BIRTH DATE:                    |  |
| SOCIAL SECURITY NO.:              |  | SOCIAL SECURITY NO.:           |  |
| COUNTRY OF CITIZENSHIP:           |  | COUNTRY OF CITIZENSHIP:        |  |
| DATE OF DEATH:                    |  | DATE OF DEATH (if applicable): |  |
| PLACE OF DEATH:                   |  | PLACE OF DEATH:                |  |
| LENGTH OF                         |  | DATE OF                        |  |

**THE LAW OFFICE OF JULIE DESORMEAUX ROSENZWEIG, LLC**

**JULIE D. ROSENZWEIG, J.D.**

3108 W. PINHOOK RD., STE. 101 • LAFAYETTE, LA 70508 • (337) 321-9111 • [JULIE@PLANWITHJULIE.COM](mailto:JULIE@PLANWITHJULIE.COM) • [WWW.PLANWITHJULIE.COM](http://WWW.PLANWITHJULIE.COM)

|                           |  |                                                                                 |      |                       |
|---------------------------|--|---------------------------------------------------------------------------------|------|-----------------------|
| TIME LIVING IN LOUISIANA: |  | DIVORCE (if applicable):                                                        |      |                       |
| DATE OF MARRIAGE:         |  | <b>Prior Marriages: (PLEASE Indicate if marriage ended by DEATH or DIVORCE)</b> |      |                       |
| PLACE OF MARRIAGE:        |  | NAME                                                                            | DATE | DECEASED/<br>DIVORCED |
|                           |  |                                                                                 |      |                       |
|                           |  |                                                                                 |      |                       |

|                                           |  |
|-------------------------------------------|--|
| <b>Executor/Administrator (Full Name)</b> |  |
| NAME:                                     |  |
| STREET ADDRESS:                           |  |
| CITY , STATE, ZIP:                        |  |
| PHONE:                                    |  |

**CHILDREN (please use full names) – If decedent had no children, list all siblings**

List names of all decedent's children (living and deceased) and also others who are named to receive a portion of the estate (please attach additional pages if necessary):

|                       |  |                       |  |
|-----------------------|--|-----------------------|--|
| <b>Name of Child:</b> |  | <b>Name of Child:</b> |  |
| Street:               |  | Street:               |  |
| City/State/Zip:       |  | City/State/Zip:       |  |
| Telephone #:          |  | Telephone #:          |  |
| Birth date:           |  | Birth date:           |  |
| Social Security No.   |  | Social Security No.   |  |
| Relationship:         |  | Relationship:         |  |
| Mother and Father:    |  | Mother and Father:    |  |

|                       |  |                       |  |
|-----------------------|--|-----------------------|--|
| <b>Name of Child:</b> |  | <b>Name of Child:</b> |  |
| Street:               |  | Street:               |  |
| City/State/Zip:       |  | City/State/Zip:       |  |
| Telephone #:          |  | Telephone #:          |  |
| Birth date:           |  | Birth date:           |  |
| Social Security No.   |  | Social Security No.   |  |
| Relationship:         |  | Relationship:         |  |
| Mother and Father:    |  | Mother and Father:    |  |

**THE LAW OFFICE OF JULIE DESORMEAUX ROSENZWEIG, LLC**  
**JULIE D. ROSENZWEIG, J.D.**

3108 W. PINHOOK RD., STE. 101 • LAFAYETTE, LA 70508 • (337) 321-9111 • JULIE@PLANWITHJULIE.COM • WWW.PLANWITHJULIE.COM

|                       |  |                       |  |
|-----------------------|--|-----------------------|--|
| <b>Name of Child:</b> |  | <b>Name of Child:</b> |  |
| Street:               |  | Street:               |  |
| City/State/Zip:       |  | City/State/Zip:       |  |
| Telephone #:          |  | Telephone #:          |  |
| Birth date:           |  | Birth date:           |  |
| Social Security No.   |  | Social Security No.   |  |
| Relationship:         |  | Relationship:         |  |
| Mother and Father:    |  | Mother and Father:    |  |

|                       |  |                       |  |
|-----------------------|--|-----------------------|--|
| <b>Name of Child:</b> |  | <b>Name of Child:</b> |  |
| Street:               |  | Street:               |  |
| City/State/Zip:       |  | City/State/Zip:       |  |
| Telephone #:          |  | Telephone #:          |  |
| Birth date:           |  | Birth date:           |  |
| Social Security No.   |  | Social Security No.   |  |
| Relationship:         |  | Relationship:         |  |
| Mother and Father:    |  | Mother and Father:    |  |

Does decedent have any other children by a previous marriage or relationship? *Yes or No*

Are any of the children under the age of 23, or have a mental incapacity or physical infirmity, are permanently incapable of taking care of their persons or administering their estates? *Yes or No*

If so, list their names, and if they are the latter, a description of their mental incapacity or physical infirmity:

| Name | Description |
|------|-------------|
|      |             |
|      |             |
|      |             |
|      |             |
|      |             |

## B. Advisers and Relationships

|                                                         |  |
|---------------------------------------------------------|--|
| <b>Certified Public Accountant:</b>                     |  |
| <b>Investment Adviser<br/>(individual and company):</b> |  |

**THE LAW OFFICE OF JULIE DESORMEAUX ROSENZWEIG, LLC**  
**JULIE D. ROSENZWEIG, J.D.**

3108 W. PINHOOK RD., STE. 101 • LAFAYETTE, LA 70508 • (337) 321-9111 • [JULIE@PLANWITHJULIE.COM](mailto:JULIE@PLANWITHJULIE.COM) • [WWW.PLANWITHJULIE.COM](http://WWW.PLANWITHJULIE.COM)

|                                        |  |
|----------------------------------------|--|
| <b>Insurance Agent(s) (Company):</b>   |  |
| <b>Primary Banking Relationship:</b>   |  |
| <b>Secondary Banking Relationship:</b> |  |
| <b>Real Estate Appraiser:</b>          |  |

### C. Wills and Agreements in Effect

|                                                                                              |  |
|----------------------------------------------------------------------------------------------|--|
| <b>Does deceased have a will?</b><br><b>(If yes, please provide original, or location)</b>   |  |
| <b>Are there any trusts in effect?</b><br><b>(Please provide copies)</b>                     |  |
| <b>Are there any marriage contracts in effect?</b><br><b>(If yes, please provide copies)</b> |  |

### D. Gift Tax Returns

|                                                                                                           |  |
|-----------------------------------------------------------------------------------------------------------|--|
| <b>Did the decedent file federal or state gift tax returns?</b><br><b>(If yes, please provide copies)</b> |  |
| <b>Did the decedent make gifts in excess of \$10,000 for which no gift tax returns have been filed?</b>   |  |

### E. Financial Information

#### Schedule A

#### REAL ESTATE & MINERAL RIGHTS

| Brief Description                          | FAIR MARKET VALUE |           |
|--------------------------------------------|-------------------|-----------|
|                                            | Separate          | Community |
| 1. Home:                                   |                   |           |
|                                            |                   |           |
| 2. Other Real Estate in Louisiana:         |                   |           |
|                                            |                   |           |
|                                            |                   |           |
|                                            |                   |           |
| 3. Other Real Estate outside of Louisiana: |                   |           |
|                                            |                   |           |
|                                            |                   |           |
|                                            |                   |           |
| 4. Mineral Rights/Royalty Interests:       |                   |           |

**THE LAW OFFICE OF JULIE DESORMEAUX ROSENZWEIG, LLC**

JULIE D. ROSENZWEIG, J.D.

3108 W. PINHOOK RD., STE. 101 • LAFAYETTE, LA 70508 • (337) 321-9111 • [JULIE@PLANWITHJULIE.COM](mailto:JULIE@PLANWITHJULIE.COM) • [WWW.PLANWITHJULIE.COM](http://WWW.PLANWITHJULIE.COM)

|             |  |  |
|-------------|--|--|
|             |  |  |
|             |  |  |
|             |  |  |
| TOTAL VALUE |  |  |

If you have copies of deeds, leases or other instruments, giving the legal description, please provide that to us. All real estate will have to be appraised.

## STOCKS & BONDS

|             |               |        | FAIR MARKET VALUE |           |
|-------------|---------------|--------|-------------------|-----------|
| Company     | Certificate # | Shares | Separate          | Community |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
|             |               |        |                   |           |
| TOTAL VALUE |               |        |                   |           |

- 3108 W. PINHOOK RD., STE. 101 • LAFAYETTE, LA 70508 • (337) 321-9111 • JULIE@PLANWITHJULIE.COM • WWW.PLANWITHJULIE.COM

Schedule C-1

BANK ACCOUNTS, CERTIFICATES OF DEPOSIT, CASH, NOTES, RECEIVABLES

|                           |         |                            |                                   | FAIR MARKET VALUE |           |
|---------------------------|---------|----------------------------|-----------------------------------|-------------------|-----------|
| Name of Bank/Institution: | Address | Type of Account and Number | Payable on Death to a Beneficiary | Separate          | Community |
|                           |         |                            |                                   |                   |           |
|                           |         |                            |                                   |                   |           |
|                           |         |                            |                                   |                   |           |
|                           |         |                            |                                   |                   |           |
|                           |         |                            |                                   |                   |           |
| TOTAL VALUE               |         |                            |                                   |                   |           |

\*NOTE: Do not list any IRA accounts

Schedule C-2

U.S. SAVINGS BONDS  
U.S. TREASURY OBLIGATIONS

| Brief Description | Payable on Death to a Beneficiary or How Denominated | FAIR MARKET VALUE |           |
|-------------------|------------------------------------------------------|-------------------|-----------|
|                   |                                                      | Separate          | Community |
|                   |                                                      |                   |           |
|                   |                                                      |                   |           |
|                   |                                                      |                   |           |
|                   |                                                      |                   |           |
|                   |                                                      |                   |           |
|                   |                                                      |                   |           |
|                   |                                                      |                   |           |
| TOTAL VALUE       |                                                      |                   |           |

THE LAW OFFICE OF JULIE DESORMEAUX ROSENZWEIG, LLC  
JULIE D. ROSENZWEIG, J.D.

3108 W. PINHOOK RD., STE. 101 • LAFAYETTE, LA 70508 • (337) 321-9111 • JULIE@PLANWITHJULIE.COM • WWW.PLANWITHJULIE.COM

## Schedule D

### LIFE INSURANCE

| Insurance Company | Insured | Beneficiary | Cash Value | Loans or Subject to Split Dollar | Face Amount Payable at Death Before Loan |
|-------------------|---------|-------------|------------|----------------------------------|------------------------------------------|
|                   |         |             |            |                                  |                                          |
|                   |         |             |            |                                  |                                          |
|                   |         |             |            |                                  |                                          |
|                   |         |             |            |                                  |                                          |
|                   |         |             |            |                                  |                                          |
| TOTAL VALUE       |         |             |            |                                  |                                          |

**(Attach a copy of policies)**

In requesting payment of life insurance proceeds, please request the insurance company to issue a Form 712 to you.

## Schedule F

### MISCELLANEOUS PROPERTY

#### AUTOMOBILES:

| Brief Description |      |     |      |          | FAIR MARKET VALUE |           |
|-------------------|------|-----|------|----------|-------------------|-----------|
|                   |      |     |      |          | Separate          | Community |
| Year              | Make | VIN | Type | Mortgage |                   |           |
|                   |      |     |      |          |                   |           |
|                   |      |     |      |          |                   |           |
|                   |      |     |      |          |                   |           |
|                   |      |     |      |          |                   |           |
|                   |      |     |      |          |                   |           |
| TOTAL VALUE       |      |     |      |          |                   |           |

**THE LAW OFFICE OF JULIE DESORMEAUX ROSENZWEIG, LLC**

JULIE D. ROSENZWEIG, J.D.

3108 W. PINHOOK RD., STE. 101 • LAFAYETTE, LA 70508 • (337) 321-9111 • [JULIE@PLANWITHJULIE.COM](mailto:JULIE@PLANWITHJULIE.COM) • [WWW.PLANWITHJULIE.COM](http://WWW.PLANWITHJULIE.COM)

**PERSONAL EFFECTS:**

| Brief Description      |  | FAIR MARKET VALUE |           |
|------------------------|--|-------------------|-----------|
|                        |  | Separate          | Community |
| Tools/Firearms:        |  |                   |           |
| Antiques:              |  |                   |           |
| Jewelry:               |  |                   |           |
| Furniture:             |  |                   |           |
| Coin/Art Collections:  |  |                   |           |
| Claims or Intangibles: |  |                   |           |
| Escrows or Deposits:   |  |                   |           |
| Debts Due Estate:      |  |                   |           |
| Miscellaneous:         |  |                   |           |
| TOTAL VALUE            |  |                   |           |

**PARTNERSHIPS OR LIMITED LIABILITY COMPANIES:**

| Brief Description | Percentage of Ownership | FAIR MARKET VALUE |           |
|-------------------|-------------------------|-------------------|-----------|
|                   |                         | Separate          | Community |
|                   |                         |                   |           |
|                   |                         |                   |           |
|                   |                         |                   |           |
|                   |                         |                   |           |

**INTEREST IN THE FOLLOWING:**

**DEFERRED CONTRIBUTION PLANS:**

| Thrift Plan, Profit Sharing Plan, ESOP or Stock Bonus | Participant | Beneficiary | Fair Market Value |
|-------------------------------------------------------|-------------|-------------|-------------------|
|                                                       |             |             |                   |
|                                                       |             |             |                   |
|                                                       |             |             |                   |
|                                                       |             |             |                   |
| TOTAL VALUE:                                          |             |             |                   |

**DEFINED BENEFIT PLANS:**

| Company      | Participant | Beneficiary | Projected Annual Payments |
|--------------|-------------|-------------|---------------------------|
|              |             |             |                           |
|              |             |             |                           |
|              |             |             |                           |
|              |             |             |                           |
| TOTAL VALUE: |             |             |                           |

**IRA ACCOUNTS:**

| Bank or Institution | Owner | Beneficiary | Fair Market Value |
|---------------------|-------|-------------|-------------------|
|                     |       |             |                   |
|                     |       |             |                   |
|                     |       |             |                   |
|                     |       |             |                   |
| TOTAL VALUE:        |       |             |                   |

**ANNUITIES:**

| Bank or Institution | Owner | Beneficiary | Fair Market Value |
|---------------------|-------|-------------|-------------------|
|                     |       |             |                   |
|                     |       |             |                   |
|                     |       |             |                   |
|                     |       |             |                   |
| TOTAL VALUE:        |       |             |                   |

**OTHER:**

| Type             | Name | Fair Market Value |
|------------------|------|-------------------|
| Unpaid Salary    |      |                   |
| Rents Receivable |      |                   |
| Notes Receivable |      |                   |
|                  |      |                   |
|                  |      |                   |
|                  |      |                   |
| TOTAL VALUE:     |      |                   |

## Schedule K

## MORTGAGES &amp; LIENS

| Brief Description of Mortgage or Debt             | AMOUNT OWED |           |
|---------------------------------------------------|-------------|-----------|
|                                                   | Separate    | Community |
| A. Mortgages on Home, Auto or other Property      |             |           |
| 1. Name of Institution:                           |             |           |
| 2. Name of Institution:                           |             |           |
| 3. Name of Institution:                           |             |           |
|                                                   |             |           |
| B. Signature Loans at Bank or Other Institutions: |             |           |
| 1. Name of Institution:                           |             |           |
| 2. Name of Institution:                           |             |           |
| 3. Name of Institution:                           |             |           |
|                                                   |             |           |
| C. Current Debts (Utilities, etc.):               |             |           |
|                                                   |             |           |
|                                                   |             |           |
|                                                   |             |           |
|                                                   |             |           |
|                                                   |             |           |
| D. Medical and Other Expenses of Last Illness:    |             |           |
|                                                   |             |           |
|                                                   |             |           |
| E. Funeral Expenses                               |             |           |
|                                                   |             |           |
|                                                   |             |           |
| F. Other Debts:                                   |             |           |
|                                                   |             |           |
|                                                   |             |           |
|                                                   |             |           |
|                                                   |             |           |
| G. Usufructuary Accounting Due:                   |             |           |
|                                                   |             |           |

THE LAW OFFICE OF JULIE DESORMEAUX ROSENZWEIG, LLC

JULIE D. ROSENZWEIG, J.D.

3108 W. PINHOOK RD., STE. 101 • LAFAYETTE, LA 70508 • (337) 321-9111 • JULIE@PLANWITHJULIE.COM • WWW.PLANWITHJULIE.COM

|             |  |  |
|-------------|--|--|
| TOTAL VALUE |  |  |
|-------------|--|--|

**Applicant**

**I certify that the information I have provided herein is true and accurate. I have carefully read this questionnaire, and I certify the information is true and complete.**

**Date\_\_\_\_\_Signature\_\_\_\_\_**

**\*\*\*THE USE OR SUBMISSION OF THIS QUESTIONNAIRE DOES NOT CONSTITUTE  
REPRESENTATION BY THE LAW OFFICE OF JULIE DESORMEAUX ROSENZWEIG, L.L.C., NOR  
SHALL IT BE CONSIDERED LEGAL ADVICE\*\*\***

**THE LAW OFFICE OF JULIE DESORMEAUX ROSENZWEIG, LLC  
JULIE D. ROSENZWEIG, J.D.**

**3108 W. PINHOOK RD., STE. 101 • LAFAYETTE, LA 70508 • (337) 321-9111 • JULIE@PLANWITHJULIE.COM • WWW.PLANWITHJULIE.COM**