



CONFIDENTIAL

ESTATE PLANNING QUESTIONNAIRE
REAL PROPERTY WORKSHEET

Date: _____

CLIENT 1 NAME	
CLIENT 2 NAME	

ABOUT THIS WORKSHEET

This is a supplementary worksheet to the Syntero Group *Estate Planning Questionnaire*. Please list any interest you own in real property, including: your family residence, vacation home(s), rental properties, time shares or vacant land. For each parcel of property, **please also provide a copy of the property's current property tax or assessor's bill.**

#

Property Address	Street Address City State Zip			
Type of Property	<input type="checkbox"/> Single Family Home <input type="checkbox"/> Commercial Property <input type="checkbox"/> Apartment Building <input type="checkbox"/> Condominium <input type="checkbox"/> Vacant Land <input type="checkbox"/> Vacation Home <input type="checkbox"/> Du/Tri/Fourplex <input type="checkbox"/> Other: <input type="checkbox"/> Timeshare			
APN (if known)		Mortgage Balance		\$
Number of Units		Percentage Owned	%	Estimated Value \$
Owned By	<input type="checkbox"/> Client 1 <input type="checkbox"/> Client 2 <input type="checkbox"/> Unknown <input type="checkbox"/> Other:			
Ownership Type / How Title is Held	<input type="checkbox"/> If married, Community Property with spouse <input type="checkbox"/> If married, Joint Tenancy with spouse <input type="checkbox"/> Joint Tenancy with someone other than spouse (i.e. a child, parent, etc.) <input type="checkbox"/> Tenant in Common w/ someone (including spouse or if unmarried couple) <input type="checkbox"/> Unknown			

#

Property Address	Street Address City State Zip			
Type of Property	<input type="checkbox"/> Single Family Home <input type="checkbox"/> Commercial Property <input type="checkbox"/> Apartment Building <input type="checkbox"/> Condominium <input type="checkbox"/> Vacant Land <input type="checkbox"/> Vacation Home <input type="checkbox"/> Du/Tri/Fourplex <input type="checkbox"/> Other: <input type="checkbox"/> Timeshare			
APN (if known)		Mortgage Balance		\$
Number of Units		Percentage Owned	%	Estimated Value \$
Owned By	<input type="checkbox"/> Client 1 <input type="checkbox"/> Client 2 <input type="checkbox"/> Unknown <input type="checkbox"/> Other:			
Ownership Type / How Title is Held	<input type="checkbox"/> If married, Community Property with spouse <input type="checkbox"/> If married, Joint Tenancy with spouse <input type="checkbox"/> Joint Tenancy with someone other than spouse (i.e. a child, parent, etc.) <input type="checkbox"/> Tenant in Common w/ someone (including spouse or if unmarried couple) <input type="checkbox"/> Unknown			