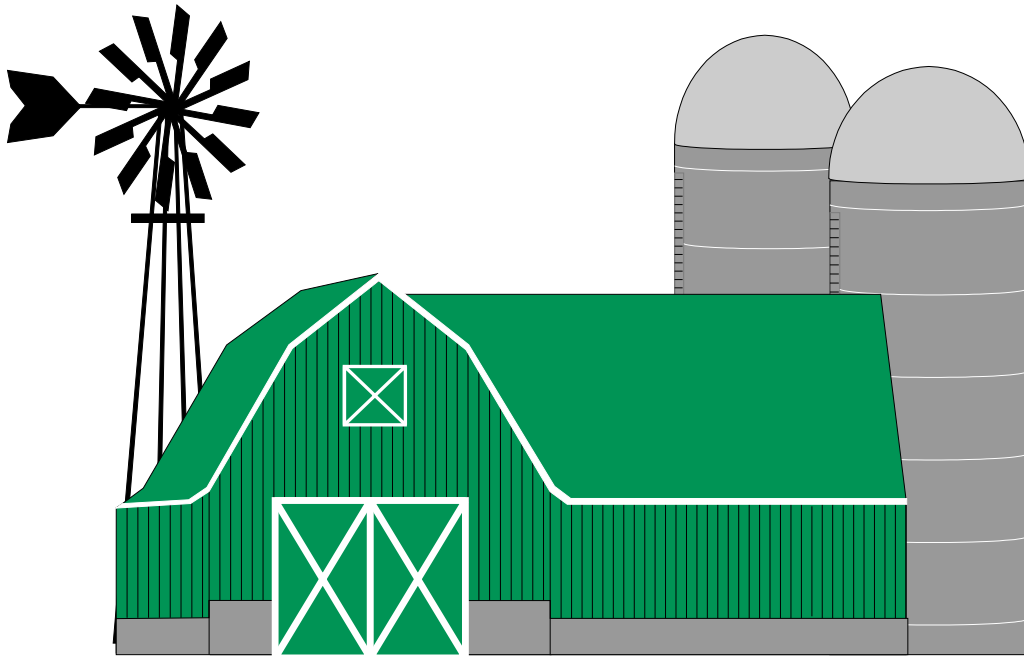


Farm Estate Planning Confidential Survey



*“Keeping the Family
Farm in the Family”*

1424 West Century Avenue
Bismarck, North Dakota 58504
1-800-373-4078 or 255-4079

Provided by: Michael Baron



CONFIDENTIAL SURVEY

Name _____ Date of Birth _____ Social Security # _____
 Spouse's Name _____ Date of Birth _____ Social Security # _____
 Residence Address _____ City _____ State _____ Zip Code _____
 Home Phone # _____ Business Phone # _____
 Occupation _____ Business Address _____
 Spouse's Occupation _____ Spouse's Business Address _____
 Spouse's Business Phone # _____ Best Time to Contact _____

CHILDREN (If Married, Give Married Names)

NAME	BIRTH DATE	ADDRESS	SPOUSE	# OF CHILDREN	INTEREST IN FARM
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Which Members of the Family Have a Will? _____
 Husband: Yes _____ No _____ Date of Will _____ Type of Will (simple, other) _____
 Wife: Yes _____ No _____ Date of Will _____ Type of Will (simple, other) _____
 Where Are Wills Kept? _____ Are You a Trustee or Guardian? _____

ATTORNEY

Name _____
 Address _____
 Telephone _____

ACCOUNTANT

Name _____
 Address _____
 Telephone _____

Are there others who are dependent upon you for support? _____

A. BANK ACCOUNTS

Checking Accounts

Bank _____ Owner(s) _____ Avg. Amount \$ _____
Bank _____ Owner(s) _____ Avg. Amount \$ _____
Bank _____ Owner(s) _____ Avg. Amount \$ _____

Savings Accounts and Certificates of Deposit

Bank _____ Owner(s) _____ \$ _____ Term _____ Renewal Date _____
Bank _____ Owner(s) _____ \$ _____ Term _____ Renewal Date _____
Bank _____ Owner(s) _____ \$ _____ Term _____ Renewal Date _____
Bank _____ Owner(s) _____ \$ _____ Term _____ Renewal Date _____
Bank _____ Owner(s) _____ \$ _____ Term _____ Renewal Date _____

TOTAL VALUE OF SECTION A ITEMS \$ _____

B. SECURITIES

U.S. Savings Bonds

Owner(s)*	Current Value \$
_____	_____

Stocks & Mutual Funds

Owner(s)*	Company	Current Value \$
_____	_____	_____
_____	_____	_____
_____	_____	_____

Retirement Plan (IRA, Keogh, TDA, Corp. Pension)

Type	Owner(s)*	Company	Current Value \$
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

TOTAL VALUE OF SECTION B ITEMS \$ _____

C. LIFE INSURANCE

Husband's Life Insurance

Company	Beneficiary	Owner	Cash Value	Premium	Face Amount
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Wife's Life Insurance

Company	Beneficiary	Owner	Cash Value	Premium	Face Amount
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

TOTAL VALUE OF SECTION C ITEMS \$ _____

D. AUTOMOBILES, FARM EQUIPMENT, LIVESTOCK, & HOUSEHOLD GOODS

Automobiles & Trucks

Make & Year	Registered Owner(s)*	Value	Where are titles kept?
_____	_____	\$ _____	_____
_____	_____	\$ _____	_____
_____	_____	\$ _____	_____

Farm Machinery & Livestock

Owner(s)*	Present Value of Machinery	Present Value of Livestock
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

Is there an inventory? _____ Where is it kept? _____

Other Items such as Grain Inventory & Special Items of Equipment

Item(s)	Owner(s)*	Present Value
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Is there an inventory? _____ Where is it kept? _____

Household Goods

Item(s)	Owner(s)*	Present Value
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Is there an inventory? _____ Where is it kept? _____

Other Items of More than Sentimental Value, such as Silver, Jewelry, Libraries, etc.

Item(s)	Owner(s)*	Present Value
_____	_____	\$ _____
_____	_____	\$ _____

TOTAL VALUE OF SECTION D ITEMS \$ _____

E. REAL ESTATE

Farms

Acres _____ Owner(s) & Type of Title* _____

How acquired (inheritance, purchase, gift) _____ Year acquired _____

Price paid or value when acquired \$ _____ Present Market Value \$ _____

Acres _____ Owner(s) & Type of Title* _____

How acquired (inheritance, purchase, gift) _____ Year acquired _____

Price paid or value when acquired \$ _____ Present Market Value \$ _____

Acres _____ Owner(s) & Type of Title* _____

How acquired (inheritance, purchase, gift) _____ Year acquired _____

Price paid or value when acquired \$ _____ Present Market Value \$ _____

Acres _____ Owner(s) & Type of Title* _____

How acquired (inheritance, purchase, gift) _____ Year acquired _____

Price paid or value when acquired \$ _____ Present Market Value \$ _____

Urban Real Estate

Acres _____ Owner(s) & Type of Title* _____

How acquired (inheritance, purchase, gift) _____ Year acquired _____

Price paid or value when acquired \$ _____ Present Market Value \$ _____

Acres _____ Owner(s) & Type of Title* _____

How acquired (inheritance, purchase, gift) _____ Year acquired _____

Price paid or value when acquired \$ _____ Present Market Value \$ _____

TOTAL VALUE OF SECTION E ITEMS \$ _____

***IF MORE THAN ONE OWNER, STATE WHETHER TITLE IS:
JOINT TENANCY, TENANCY IN COMMON, OR SOLE OWNERSHIP.**

F. MORGAGES & DEBTS

Real Estate Mortgages & Amounts Owed on Real Estate Purchase Contracts

Property	Name of Creditor or Seller	Date Due	Amount Due
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
Annual Mortgage Payment \$ _____		Interest % _____	

Chattel Mortgages

Property Mortgages	Name of Creditor or Lender	Date Due	Amount Due
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

Unsecured Notes

Name of Creditor or Lender	Date Due	Amount Due
_____	_____	\$ _____
_____	_____	\$ _____

TOTAL VALUE OF SECTION F ITEMS \$ _____

G. VALUE OF ESTATE**

Gross Estate (Section A+B+C+D+E)	\$	_____
Indebtedness (Section F)	\$	_____
Net Estate (Gross Estate LESS Indebtedness)	\$	_____

****THE ESTATE VALUE COMPUTED HERE DOES NOT NECESSARILY INDICATE
THE VALUE FOR ESTATE TAX COMPUTATION**

Have you made or do you plan any lifetime gifts? _____

Which assets would be liquidated and which debts paid at death? _____

Names of children now helping with the farm _____

How Long? _____

What are your plans for your children?

Do you have disability income protection? _____

Are you eligible for any military benefits? _____

Do you currently have medical coverage? _____

If so, on which members of the family? _____

Does husband have any health problems? _____

Does wife have any health problems? _____

Are there any expected inheritances? _____

What specific wishes do you have regarding your family? _____

Income for Spouse \$ _____

Disposition of Property _____

