



WILLS, ESTATE, PROBATE, AND TRUST SUPPLEMENT (“WEPT”)

Firm Name: _____ Policy Number _____

Please complete the following for work performed within the last twelve (12) months

- 1. What percentage of the firm’s WEPT practice is devoted to Estate Planning? Please check ‘Yes’ or ‘No’ for type of work performed by firm under Estate Planning:

Table with 2 columns: Description of work type and percentage. Rows include Estate Planning (summary), Will Drafting, Trust Drafting and Advice, Private Business Succession and Tax Planning, Medical Directives, Power Of Attorney, and Other (please describe).

- 2. What percentage of the firm’s WEPT practice is devoted to Estate Administration/Probate? Please check ‘Yes’ or ‘No’ for type of work performed by firm under Estate Administration/Probate:

Table with 2 columns: Description of work type and percentage. Rows include Estate Administration/Probate (summary), Probate/Estate Administration, Inheritance Tax Compliance, and Trust Administration.

- 3. What percentage of the firm’s WEPT practice is devoted to Estate Litigation? Please check ‘Yes’ or ‘No’ for type of work performed by firm under Estate Litigation:

Table with 2 columns: Description of work type and percentage. Rows include Estate Litigation (summary), Will Contests, Probate Litigation, Trustee Liability, Executor Liability, Trust Litigation (construing or reforming terms), and Other (please describe).



WILLS, ESTATE, PROBATE, AND TRUST SUPPLEMENT (“WEPT”)

- 4. Does the firm provide tax and investment advice in connection with estate planning (as defined above)? Yes No
 - a. If yes, does the firm have in-house accountants or consultants to assist with the preparation of tax returns? Yes No
 - b. If yes, does the firm retain outside accountants or advisers concerning tax or investment advice? Yes No
 - c. Does the firm’s engagement letter make clear whether or not tax and investment advice is being provided? Yes No

- 5. Does the firm prepare final income tax returns or estate income tax returns (federal and state)? Yes No
 - a. If yes, does the firm have in-house accountants or consultants to assist with the preparation of tax returns? Yes No
 - b. If yes, does the firm retain outside accountant or consultants to assist with the preparation of tax returns? Yes No

- 6. Does the firm:
 - a. Represent both the Testator/Decedent and Beneficiaries of an estate? Yes No
 - b. Serve as Executors or Personal Representatives of a client’s estate? Yes No
 - c. Serve as Trustee of client trust? Yes No
 - d. Have procedures in place to audit or reconcile trust accounts that the firm serves as Trustee? Yes No
 - e. Have procedures in place to monitor trust activity? Yes No
 - f. Have authority to write checks in connection with any services as an Executor or Trustee? Yes No
 - i. If yes, are dual or countersignatures required? Yes No

7. With regard to firm’s handling of **Estate Planning** and **Estate Administration**, please breakdown values of estates by percentage:

Value of Estate	% of Estate Planning and Administration
< 1M	%
1M – 5M	%
> 5M	%

Signature of Partner/Officer: _____ Date: _____ Print Name: _____