

WILL QUESTIONNAIRE

PLEASE TYPE OR PRINT:

1. Full name:

FIRST	MIDDLE	LAST
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2. A. Any other name by which you have been known:

B. Date of Birth: _____ C. Sex: _____ Male _____ Female

3. Physical Address: _____

City: _____ County _____ State: _____ Zip Code _____

Mailing Address (if different): _____

City: _____ County _____ State: _____ Zip Code _____

Telephone: (home) _____ (work) _____

Cell: _____ Fax (if applicable): _____

e-mail address: _____

4. Are you married? Yes _____ No _____

If you are married, state spouse's full name: _____

If you are married, does your spouse wish to have us prepare a Will for him/her?

Yes _____ No _____ If so, please have your spouse fill out a separate questionnaire.

5. If you were previously married, please state your ex-spouse's name and approximate date of marriage and divorce or death.

6. If you have children from your current marriage, state the following for ALL children:

FULL NAME	SON/DAUGHTER	AGE	CURRENT ADDRESS
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7. If you have children from a previous marriage, state the following for ALL children:

FULL NAME	SON/DAUGHTER	AGE	CURRENT ADDRESS
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8. If your children are from a previous marriage, do you wish to make a provision in your Will for those children?

9. If your children from your current marriage are under age 18, state the full name, address and relationship (if any) of the person you wish to act as their legal guardian in the event of your death (in the case of a single parent) or in case of the joint death of you and your spouse (if married). You should obtain the consent of that person(s) before executing your Will.

a. Name(s): _____

b. Address: _____

c. State: _____

d. Relationship (if any): _____

If the person named above is unwilling or unable to serve as guardian, please list an alternative:

e. Name(s): _____

f. Address: _____

g. Relationship (if any): _____

10. List the following:

a. Real estate owned by you in whole or in part and how it is held (jointly; tenancy, tenancy-in-common, sole ownership):

11. Life Insurance, etc.: *Note- Life insurance proceeds pass directly to the named beneficiary on the policy and not by way of Will. If you want your life insurance proceeds to pass by way of Will you must change the name of the beneficiary on the policy to “the Estate of: Your name”. The same holds true with respect to retirement accounts; they are paid directly to the named beneficiary.

a. Life insurance on person making Will: \$ _____

Name of insurance company: _____

Name of Beneficiary: _____

b. Retirement Benefits, or Annuities: \$ _____

c. Name of Beneficiary: _____

d. Retirement or Death Benefits from sources other than employment.

\$ _____

12. a. Generally, most married people provide that upon their death, their property passes:
- (1) To surviving spouse.
 - (2) If your spouse predeceases you, your property will be divided in equal shares among all your living children.
 - (3) If your spouse and one of your children predeceases you, that child's share in your estate is distributed to his or her children (your grandchildren) in equal shares.
- b. If you have children from a previous marriage some persons wish to provide for those children by way of Will, rather than leaving everything to the surviving spouse and then leaving it up to him/her to provide for those children.
- c. Most unmarried persons with children provide that upon their death, their property passes:
- (1) In equal shares to all your living children.
 - (2) If one or more of your children predeceases you, that child's share in your estate is distributed to his and her children (your grandchildren) in equal shares.

IF YOU DO NOT WISH YOUR PROPERTY TO PASS IN THE MANNER SET FORTH IN PARAGRAPH 12 ABOVE, PLEASE CHECK HERE. _____ DESCRIBE HOW YOU WOULD LIKE YOUR PROPERTY TO PASS; EITHER HERE OR IN PARAGRAPH 13 BELOW.

13. If you are not married and have no children, or have other wishes with respect to who should receive your property, list the name(s) and address(es) of the person(s) you wish to receive your property. Also, list the percentage they are to receive.

FULL NAME	ADDRESS	PERCENTAGE
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14. If any property under your Will is passing to minor children, we can establish a trust for the minor children until they reach the age of majority (18), or any other age you select. A Trustee will need to be named. The Trustee will administer the Trust, including making investments, distributing funds to beneficiaries, etc. Please state the name, address and relationship of the individual you wish to name as Trustee. Note: the Trustee may be the same person you may have named as Personal Representative and/or guardian of any minor children.

NAME: _____

ADDRESS: _____

RELATIONSHIP: _____

15. If the person named above does not wish to, or is unable to act as Trustee, please state the name, address and relationship of the individual you wish to name as Alternate Trustee.

NAME: _____

ADDRESS: _____

RELATIONSHIP: _____

16. State the age of which you wish each beneficiary of the Trust to receive his/her distribution:

AGE: _____

17. Unless you request otherwise, the Will we prepare for you will permit you to leave gifts of personal property by simply making a list according to law. Many people, however, make special provisions in their Wills for family heirlooms, jewelry or other items of special value to friends or relatives. If you have such property and wish it left to a specific person in your Will, please complete the following:

ITEM	SPECIAL IDENTIFYING FEATURES	RECIPIENT
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

18. The person charged with administering your Estate, paying taxes and other debts, marshaling, preserving, and managing estate assets and property is called a Personal Representative. Generally, most married persons list their spouse and one alternate. If you wish to name your spouse as Personal Representative, please mark here _____, and, state the name and address

of the person you wish to serve as an Alternate Personal Representative below. Note: the Personal Representative may be the same person you may have named as Trustee and/or guardian of any minor children.

ALTERNATIVE PERSONAL REPRESENTATIVE:

a. Full name: _____

b. Address: _____

c. Relationship (if any): _____

19. Do you want to include a provision state that if anyone contests your Will, they will receive nothing?

Yes _____ No _____

20. Do you wish to give your Personal Representative authority to sell property without the need for prior court approval?

Yes _____ No _____

21. Do you wish to disinherit your spouse, any child, or any grandchild? If so, you must list their names here.

22. Do you wish to authorize your Personal Representative to serve without the expense of a bond?

Yes _____ No _____