



Will Questionnaire

IN ORDER TO DRAFT WILLS, PLEASE SUPPLY THE FOLLOWING INFORMATION TO YOUR ATTORNEY.

Personal Information:

Full Name: _____ Date of Birth: _____

Address: _____ Telephone: _____

Distribution of Your Property:

	<i>Yes</i>	<i>No</i>
1. If Husband dies before Wife, 100% of estate to go to Wife?		
2. If Wife dies before Husband, 100% of estate to go to Husband?		
3. If Husband and Wife are both deceased, 100% of estate to go to all children equally		
4. If any of the above answers are "No", list the names of your children, church, charity, or others and the percentage (%) of your estate you desire to give each. Alternatively, note the specific amount of cash or other property you want to give to certain people charities.		
<i>Name</i>	<i>% or Specific Amount</i>	
_____	_____	
_____	_____	
_____	_____	
_____	_____	

5. If you and your spouse die prematurely, at what age do you want your children to receive your estate? Until this age, the Trustee will take care of their financial needs. If no age is specified, they will receive 100% at age 18. You can specify money for college. Then you can decide what age the children receive the proceeds and what percentage.

<i>At Age</i>	<i>%</i>
_____	_____
_____	_____
_____	_____
_____	_____

Balance at age: _____

6. If one of your children dies before you, that child's share to go to:

- a. His/Her Children
- b. Your Other Living Children
- c. Your Deceased Child's Spouse
- d. Other:

7. If none of your descendants are living at the time of your death, who do you want to receive your assets, such as extended family, friends or charities? Please list the amounts and/or percentages:

<i>Name</i>	<i>% or Specific Amount</i>
_____	_____
_____	_____
_____	_____
_____	_____

Executor of Your Estate:

List in order of preference the person and/or institution (such as a bank or trust company) you wish to name as your Executor. Name at least two if you do not name a bank. For married clients, husband is usually named first as Executor for wife, and wife is usually named first as Executrix for husband, and each would then name someone else as an alternate.

	Yes	No
1. As Husband, I desire to name my Wife as In Executrix		
2. As Wife, I desire to name my Husband as m Executor		

	Name	Relationship	Address	City, State, Zip
1.	_____			
2.	_____			

How should alternative Executors #1 and #2 above serve? Jointly of First #1, then #2

Guardians for Your Minor Children:

If any of your children are minors (under 18), please indicate your first and second choices for Guardians for them if something should happen to both parents. Please name two choices — your first choice and an alternate.

	Name	Relationship	Address	City, State, Zip
1.	_____			
2.	_____			

Trustee of Trusts You Create in Your Will:

List in order of preference the persons and/or bank you wish to name as Trustee for minor children or others. (If you do not wish to name a bank, please name at least two choices — your first choice and an alternate.)

	Name	Relationship	Address	City, State, Zip
1.	_____			
2.	_____			

How should alternative Trustees #1 and #2 above serve? Jointly of First #1, then #2

Create Power of Attorneys

Whom do you want to name to act on your behalf? _____

Backup: _____

Do You Want a Living Will? Yes No

If so, whom do you want to name to act on your behalf? _____

Backup: _____

Additional Information to Consider:

- Estate Planning considerations... i.e. Standard Marital Deduction Trust, Q-Tip Trust, Family Trust, etc.
- Management and distribution of digital assets. (Emails, Social Media, Photographs, other data bases)
- Limit the investment powers of the Executor/Trustee to moderate the conservative investments.

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