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WILL QUESTIONNAIRE

A **Will** is a legal document where you specify what you want done with your assets when you die. Only assets that do not have joint owners with the right of survivorship or named beneficiaries pass through the Will. The Will is the last process to control disposition of assets, as assets that are jointly owned (with the right of survivorship) and property that has beneficiary designations will take precedence over the Will and will be paid out before the Will is probated.

This Will Questionnaire is NOT your Will. It will help us prepare your Will. If you need more space to answer a question, use the last page of this questionnaire and indicate the question number to which it pertains.

Date: _____

Part 1 – Personal Information

1. Information about You

Full Legal Name: _____

Address:

House No.	Street Name	Apt. No.	
City	County	State	Zip Code

Date of Birth: _____

Place of Birth: _____

Relationship Status: Single Married Divorced Widowed

Contact Information:

Home Phone: (_____) _____

Work Phone: (_____) _____

Cell Phone: (_____) _____

E-mail: _____

Funeral Wishes:

Do you wish to be: Buried If so, where? _____

Cremated If interred, where? _____

2. Information about your Spouse (if applicable)

Full Legal Name:

Address:

House No.

Street Name

Apt. No.

City

County

State

Zip Code

Date of Birth:

Place of Birth:

Contact Information:

Home Phone: (_____) _____

Work Phone: (_____) _____

Cell Phone: (_____) _____

E-mail: _____

3. Information about your Children (if applicable)

Full Legal Name	Birth Date	Biological Parents
		<input type="checkbox"/> Both <input type="checkbox"/> Yours <input type="checkbox"/> Spouse's
		<input type="checkbox"/> Both <input type="checkbox"/> Yours <input type="checkbox"/> Spouse's
		<input type="checkbox"/> Both <input type="checkbox"/> Yours <input type="checkbox"/> Spouse's
		<input type="checkbox"/> Both <input type="checkbox"/> Yours <input type="checkbox"/> Spouse's
		<input type="checkbox"/> Both <input type="checkbox"/> Yours <input type="checkbox"/> Spouse's

4. Information about your Grandchildren (if applicable)

Full Legal Name	Birth Date	Biological Grandparents
		<input type="checkbox"/> Both <input type="checkbox"/> Yours <input type="checkbox"/> Spouse's
		<input type="checkbox"/> Both <input type="checkbox"/> Yours <input type="checkbox"/> Spouse's
		<input type="checkbox"/> Both <input type="checkbox"/> Yours <input type="checkbox"/> Spouse's
		<input type="checkbox"/> Both <input type="checkbox"/> Yours <input type="checkbox"/> Spouse's
		<input type="checkbox"/> Both <input type="checkbox"/> Yours <input type="checkbox"/> Spouse's

Part 2 – Will Instructions

In these next sections you will list your beneficiaries and indicate what property they are to receive. You can make specific distributions to beneficiaries or leave everything as a “lump sum” distribution to your beneficiaries.

1. Distribution of Property

1.1 Specific Bequests:

You may make separate gifts of cash, specific investments, real estate, or personal property to specific people or charities in your Will. These bequests will be distributed first and reduce the amount of property left for your other beneficiaries.

Do you have specific item(s) you wish to leave to a named individual rather than distributed as part of the residue of your Estate? No Yes – List the specific bequests below:

Item / Cash Amount	Beneficiary's Full Name	Relationship to You

1.2 Real Estate:

Real estate may be passed separately in a Will. If you own your real estate jointly with right of survivorship it will automatically pass to the surviving joint owner upon your death. These bequests will be distributed first and reduce the amount of property left for your other beneficiaries.

Do you have real estate you wish to leave to a named individual rather than distributed as part of the residue of your Estate? No Yes – List the specific bequests below:

Full Address of Real Estate	Beneficiary's Full Name	Relationship to You

1.3 **Remaining Assets:**

When you die, how is the balance of your assets, after giving any Specific Bequests and Real Estate, to be distributed?

A. Primary Beneficiaries of Remaining Assets (Choose One)

- My Spouse, if he/she survives me, and if not, then to my children; **or**
- My Children; **or**
- To these Beneficiaries in the percentages noted below:

Full Name	Full Address	Relationship to You	%

If Primary Beneficiaries predecease you, how is their share to be distributed? (Choose One)

- Per Stirpes – Their share will be divided equally among their children; **or**
- Per Capita – Their share will be divided equally among the remaining Primary Beneficiaries

B. Alternate Beneficiaries of Remaining Assets (recommended)

If all of your Primary Beneficiaries predecease you, who do you want to receive your assets?

Full Name	Full Address	Relationship to You	%

If Alternate Beneficiaries predecease you, how is their share to be distributed? (Choose One)

- Per Stirpes – Their share will be divided equally among their children; **or**
- Per Capita – Their share will be divided equally among the remaining Alternate Beneficiaries
-

2. Disinheritance

Do you wish to disinherit any Children or Grandchildren?

No Yes – Provide the following information:

Full Name	Relationship	Reason for Disinheritance

3. Appointment of Trustees

If any of your Beneficiaries are minors, you may appoint a Trustee to manage the assets to support the Beneficiary's health, education, maintenance, and support. Do you want to name a Trustee?

No Yes – Provide the following information:

3.1 **At what age do you want your Beneficiaries to receive their inheritance free of trust?** _____ Years of Age

3.2 **Whom do you wish to name as Trustee?**

Full Name	Full Address	Relationship to You

3.3 **Whom do you wish to name as Alternate Trustee? (recommended)**

Full Name	Full Address	Relationship to You

4. Appointment of Guardians

If any of your children are minors and **if** their other natural parent is not alive or cannot act as guardian, you may appoint a Guardian to have physical control and custody of the children. Do you want to name a Guardian?

No Yes – Provide the following information:

4.1 **Whom do you wish to name as Guardian?**

Full Name	Full Address	Relationship to You

4.2 **Whom do you wish to name as Alternate Guardian? (recommended)**

Full Name	Full Address	Relationship to You

