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QUESTIONNAIRE TO AID PREPARATION OF YOUR WILL

Section A:

1. Your Name: _____

Birth Date: _____ Social Security #: _____

2. Spouse=s Name: _____

Birth Date: _____ Social Security #: _____

3. Your Address: _____

4. Telephone #: (Home) _____ (Work) _____

5. United States Citizen:

____ Yes ____ No

(Spouse) ____ Yes ____ No

6. Marriages:

Date and Place of Current Marriage:

Prior Marriage(s):

Date: _____ How and when terminated:

6. Children:

Name: _____ Age: _____

Name: _____ Age: _____

Name: _____ Age: _____
7. Grandchildren:

Name: _____ Age: _____

Name: _____ Age: _____

Name: _____ Age: _____

8. Parents:

(Yours):

Name: _____ Living/Deceased _____

Name: _____ Living/Deceased _____

(Your Spouse=s):

Name: _____ Living/Deceased _____

Name: _____ Living/Deceased _____

9. Other Living Relatives:

Name: _____ Relationship: _____

Name: _____ Relationship: _____

Name: _____ Relationship: _____

10. Do you have any existing wills? ____ Yes ____ No

11. If your answer to question # 10 is Ayes@, where is your will located?

Section B:

1. Who would you choose as Executor of your estate, to carry out the wishes of your Will?

Executor: _____

Alternate Executor (in case your first choice cannot act): _____

2. In the event of the death of both you and your spouse, do you want a trustee (selected by you) to manage the funds of your estate and pay over time what is needed for the support and education of your children, until you feel they are old enough to manage the funds themselves?

Yes No

3. If your answer to question # 2 is Ayes@, at what age do you feel the trustee should Aturn over@ control of all funds of your estate to your children?

21 22 25 Other (please specify age)

4. If your answer to question # 2 is Ayes@, who would you choose as Trustee?

Trustee: _____

Alternate Trustee (in case your first choice cannot act): _____

5. Do you wish to express who should be the guardian of your kids in the event of the death of both you and your spouse? Expressing a preference for the guardianship of your children in your will does not legally grant that individual guardianship for the children. However, it is heavily influential in who is granted guardianship.

Yes No

6. If your answer to question # 5 is Ayes@, who would you choose to be Guardian of your children?

Guardian: _____

Alternate Guardian (in case your first choice cannot act): _____

7. Do you want a ALiving Will@, which is a separate document giving you the power to direct the withholding of medical treatment when you are terminally ill and, if you are unconscious or otherwise unable to make a decision on medical treatment, authorize a named family member or trusted friend to make such decisions on your behalf?

Yes No

8. If your answer to question # 7 is Ayes@, who would you choose as your Caregiver?

Caregiver:

Name : _____

Address: _____

Telephone #: _____

Alternate Caregiver (in case your first choice cannot act):

Name: _____

Address: _____

Telephone #: _____

9. Do you want a ADurable Power of Attorney@, which is a separate document giving a named family member or trusted friend the power to act on your behalf for financial matters despite your disability or incapacity, thus avoiding the need for costly and time consuming court proceedings to appoint a guardian, in the event of your future disability or incapacity?

____ Yes ____ No

Please list your assets with the approximate values and ownership (i.e. Husband, wife, joint with spouse or children, etc.) of each, in the following categories. This information is needed in case you and your spouse are deceased. It will allow your named executor to accurately locate your assets.

A. Real Estate Owned (Including title owner information and value of any mortgages):

B. Business Affiliations and Interests:

C. Stocks, Bonds, and Investments:

D. Savings Accounts and Certificates of Deposits:

E. Safe Deposit Boxes (Including location and how registered):

F. Loans Owed to You or Other Liabilities:

G. Pensions and I.R.A.=s (Including beneficiary designation):

H. Personal Property (Including automobiles, furs, jewelry, art, or other items of substantial value):

I. Life Insurance (Including beneficiary designation):

Section D: Disposition of Estate

Please designate specific items of personalty, such as jewelry, furs, works of art, silverware, china, etc. Where shares are bequeathed, please indicate if increments, splits, mergers, and substitutions are included. Where income of stock is bequeathed, please indicate if cash dividends are included.

1. To Spouse:

Special Conditions or Contingencies:

2. To: _____

Relationship: _____

Address: _____

Age (if under 18): _____

3. To: _____

Relationship: _____

Address: _____

Age (if under 18): _____

4. To: _____

Relationship: _____

Address: _____

Age (if under 18): _____

5. To: _____

Relationship: _____

Address: _____

Age (if under 18): _____

6. To: _____

Relationship: _____

Address: _____

Age (if under 18): _____

7. To: _____

Relationship: _____

Address: _____

Age (if under 18): _____

8. Charitable Bequests:

9. Funeral, Burial, Monument, Services, Grave Care, etc:

