

WILL QUESTIONNAIRE

YOUR NAME: _____

NAME OF SPOUSE: _____

ADDRESS: _____

EMAIL: _____

PHONE: CELL _____

ARE THERE CHILDREN FROM PRIOR MARRIAGES, IF SO, PLEASE IDENTIFY?

NAMES	AGES OF CHILDREN	PARENT
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COUNTY OF YOUR RESIDENCE: _____

CHILDREN OF YOUR SPOUSE:

NAMES

AGES OF CHILDREN:

ARE ANY OF YOUR CHILDREN SPECIAL NEEDS? IF SO, IDENTIFY?

ARE ANY CHILDREN ON SSI OR SSDI?

AMOUNT OF BENEFITS RECEIVED FROM GOVERNMENT SOURCES?

ASSETS

PLEASE INDICATE IF ASSET IS OWNED BY HUSBAND (H) OR WIFE (W)

AMOUNT OF CASH IN BANKS:

IDENTIFY ALL STOCKS AND BONDS YOU OWN?

LIFE INSURANCE: PLEASE IDENTIFY COMPANY AND AMOUNT OF INSURANCE.

REAL PROPERTY: IDENTIFY PROPERTY AND HOW TITLE IS HELD. IN LIEU OF RESPONDING TO THIS QUESTION PLEASE ATTACH A COPY OF YOUR DEED.

APPROXIMATE OF YOUR ESTATE?
APPROXIMATE AMOUNT OF YOUR SPOUSE'S ESTATE?

WHAT ARE YOUR LIABILITIES? DO YOU HAVE ANY LOANS OR MORTGAGES? IF SO, PLEASE IDENTIFY?

WHAT ARE YOUR OBJECTIVES IN ESTABLISHING AN ESTATE PLAN?

DO YOU PREFER AN ESTATE PLAN USING A WILL? _____

DO YOU PREFER AN ESTATE PLAN USING A REVOCABLE LIVING TRUST?

HOW DO YOU WANT YOUR PROPERTY TO BE DISBURSED UPON YOUR DEATH?

IF YOU HAVE MINOR CHILDREN, DO YOU WANT A TESTAMENTARY TRUST? WHO DO YOU WANT AS THE TRUSTEE AND SUCCESSOR TRUSTEE?

AT WHAT AGE WOULD YOU LIKE FOR YOUR CHILDREN TO HAVE THE PROPERTY YOU HAVE LEFT TO THEM?

Do you need a testamentary Trust for grandchildren? If so, who will serve as Trustee and Successor Trustee? Age of grandchildren?

Burial _____

Cremation _____

WHO WILL BE YOUR ESTATE REPRESENTATIVE?

WHO WILL BE YOUR SUCCESSOR ESTATE REPRESENTATIVE?

Signature

Signature

PLEASE EMAIL INFORMATION TO
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