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Last Will & Testament Questionnaire



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Last Will

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Note: If you own an interest in a business, own real property other than your home, your estate total is more than \$600,000, you have been married more than once, or any of your children have special needs we recommend contacting an attorney to discuss your legal rights before proceeding with this questionnaire.

1. Personal Information:

Full name: → <i>Legal Name (First MI Last)</i>			
Address: → Line 1			Apt. #
Address: → Line 2			
City: →	State:	ZIP	
Social Security No.:	--	--	
Home Phone No.	()	Work Phone No.	()
Cell Phone →	()		
Date of Birth: → <i>(mm/dd/yy)</i>	Age:		
E-Mail: →			

Gender: Male Female Marital Status: Single Married

If married:

Spouse's name: → <i>Legal Name (First MI Last)</i>		
Date of Birth: → <i>(mm/dd/yy)</i>	Age:	

2. Children's Information:

Do you have children born or adopted? Yes No

#1 Child's name: <i>Legal Name (First MI Last)</i>			
	Date of Birth: → <i>(mm/dd/yy)</i>	Age:	
Gender:	<input type="checkbox"/> Male <input type="checkbox"/> Female		

#2 Child's name: <i>Legal Name (First MI Last)</i>			
	Date of Birth: → <i>(mm/dd/yy)</i>	Age:	
Gender:	<input type="checkbox"/> Male <input type="checkbox"/> Female		

#3 Child's name: <i>Legal Name (First MI Last)</i>			
	Date of Birth: → <i>(mm/dd/yy)</i>	Age:	
Gender:	<input type="checkbox"/> Male <input type="checkbox"/> Female		

Use additional paper for more children if necessary.

3. If there are minor children involved who do you wish to nominate as the guardain(s) of the children?

Minor Children

We can include a provision for you to nominate 2 possible guardians for your children in your Will. If you have children that have not reached the legal age of majority (18 in most states), a guardian or conservator will be appointed by the court upon your death if the other natural parent or no other legal guardian is then living. Nomination of your preferred guardians in your Will is persuasive, but does not mean the court must appoint any of your choices.

Guardian's Name: <i>Legal Name (First MI Last)</i>			
Address: → Line 1			Apt. #
Address: → Line 2			
City: →	State:	ZIP	

If the Guardian is married:

Guardian's Name: <i>Legal Name (First MI Last)</i>			
Address: → Line 1			Apt. #
Address: → Line 2			
City: →	State:	ZIP	

If the Guardian is unable or unwilling to serve as the Guardian who would you like to be as an Alternate Guardian?

Alt. Guardian's Name: <i>Legal Name (First MI Last)</i>	
Address: _____ Line 1	Apt. #
Address: _____ Line 2	
City: _____	State: _____ ZIP _____

If the Alternte Guardian is married:

Alt. Guardian's Name: <i>Legal Name (First MI Last)</i>	
Address: _____ Line 1	Apt. #
Address: _____ Line 2	
City: _____	State: _____ ZIP _____

4. Appointing a Personal Representative (Executor) of your Will?

Represtive's Name: <i>Legal Name (First MI Last)</i>	
Address: _____ Line 1	Apt. #
Address: _____ Line 2	
City: _____	State: _____ ZIP _____

Would you like a Co-Represtive?

Co-Resp.'s Name: <i>Legal Name (First MI Last)</i>	
Address: _____ Line 1	Apt. #
Address: _____ Line 2	
City: _____	State: _____ ZIP _____

If your Representative (or Co-Representative) is unable or unwilling to serve who do you wish to appoint as the Alertante Personal Representative (Executor) of your Will?

Alt. Reps' Name: <i>Legal Name (First MI Last)</i>			
Address: _____ Line 1			Apt. #
Address: _____ Line 2			
City: _____	State: _____	ZIP _____	

NOTE: The personal representative, also referred to as an executor, is the person or institution who will handle the probate court proceedings and will gather all of your assets after you die. An individual, such as your spouse or your child, or a bank or trust company may be named as personal representative. Many people name a bank or trust company as either the original personal representative or as a successor to avoid an unwelcome problem:

The individuals named in the will have all died or are unable or unwilling to act as personal representative, leaving the probate court with the task of finding a replacement.

5. You may wish to make a special or general bequest to a person or charitable organization:

#1 Item or dollar amount that you wish to bequest:			
Person or charitable organization's Name:			
Address: _____ Line 1			Apt. #
Address: _____ Line 2			
City: _____	State: _____	ZIP _____	

#2 Item or dollar amount that you wish to bequest:			
Person or charitable organization's Name:			
Address: _____ Line 1			Apt. #
Address: _____ Line 2			
City: _____	State: _____	ZIP _____	

6. Residual estate: please indicate by checking the appropriate section, how you wish your remaining assets to be distributed.

Option A: I am married with children and want my assets to pass as follows:

- To my spouse.
- In the event my spouse predeceases me, then my assets shall be divided equally among my children.
- If any of my children predecease me, that child share shall be distributed equally between the surviving children.

Option B: I am not married with children and want my assets to pass as follows:

- In equal shares among my children.
- If any of my children predecease me, that child's share shall be divided equally between the surviving children.

Option C: I am married with no children and want my assets to pass as follows:

- To my surviving spouse.
- In the event that my spouse predecease me, I want my assets distributed in equal shares as follows:

#1 Person's Name:	
Relationship	
Address: _____ <small>Line 1</small>	Apt. #
Address: _____ <small>Line 2</small>	
City: _____	State: _____ ZIP _____

#2 Person's Name:	
Relationship	
Address: _____ <small>Line 1</small>	Apt. #
Address: _____ <small>Line 2</small>	
City: _____	State: _____ ZIP _____

#3 Person's Name:	
Relationship	
Address: _____ <small>Line 1</small>	Apt. #
Address: _____ <small>Line 2</small>	
City: _____	State: _____ ZIP _____

X _____ Date _____
Client's signature