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# Last Will & Testament Questionnaire



13817 North 19<sup>th</sup> Ave., Phoenix, AZ 85023-6105  
602-896-9020 Off. 602-896-1411 Fax.  
DiscountDivorce@msn.com  
DiscountDivorceAZ.com



Member Central/Northern Arizona

An Arizona Legal Document Company  
**Discount Divorce & Bankruptcy**  
PO Box 83463  
Phoenix, AZ 85071-3463

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# Last Will

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Discount Divorce Professionals, LLC. is a charter member in good standing with the Arizona Association of Independent Paralegals ®

HOW DID YOU HEAR ABOUT US?

Web Site

Yellow Pages

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Other \_\_\_\_\_

**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 many, 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: _____ Line 1	Apt. #
Address: _____ Line 2	
City: _____	State: _____ ZIP _____

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

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

# Discount Divorce Professionals, LLC.

## AGREEMENT

This agreement, entered into this \_\_\_\_\_, constitutes the full and complete agreement of Discount Divorce Professionals  
(date)

and its client: \_\_\_\_\_  
(printed name)

Discount Divorce Professionals is not a law firm. Discount Divorce Professionals is a document preparation service I (the client) understands that Discount Divorce Professionals, LLC. not a law firm and is a document preparation company and its representatives can not give legal advice. I agree that Discount Divorce Professionals, LLC. is preparing only a last will and testament.

### Proof Reading Documents

I understand that I am responsible for proof-reading documents for typographical and other errors before signing finished documents. I agree that I will hold Discount Divorce Professionals, LLC., its stockholders, representatives, or any other person connect harmless and not liable for any errors or omissions regardless of who fault it maybe.

### Privacy Policy

I understand that when an e-mail address, telephone, or fax number have been given to Discount Divorce Professionals, LLC., it is assumed that I have already taken the appropriate steps to protect my own confidentiality and privacy as necessary. All information provided to Discount Divorce Professionals, LLC. will be treated as confidential. I also understand, no "Attorney-Client Privilege" exists because Discount Divorce Professionals, LLC. is not a law firm and I they are subject to subpoena and can be ordered to testify.

### Guarantee of Service

I understand that there is no guarantee that any of the information, applications, or forms provided by Discount Divorce Professionals, LLC. will be accepted by any courts or government agencies. There is no guarantee that I will receive favorable results for which have been applied for. I understand documents and information provided by Discount Divorce Professionals, LLC. do not give me any advantage over documents and information provided by any other legal, paralegal or business information service company, any other attorney, any other financial advisor, etc.

### Supplementation Information

I understand that Discount Divorce Professionals, LLC. cannot be held responsible for the veracity and/or reliability of information provided by me or by any third parties (such as agents, attorneys or government entities).

### Web Site Content

I understand that comments and other information presented in the Discount Divorce Professionals, LLC. web site are generalizations and may not apply to every situation. Matter included there may not be current and is subject to change without notice. Since Discount Divorce Professionals, LLC. is not an attorney, no attorney client relationship is established by the viewing, use, or communication in any manner through its web site.

### Refund Policy

I understand that because work starrs immediately, Discount Divorce Professionals, LLC. does not accept cancellations **THERE ARE ABSOLUTELY NO REFUNDS UNDER ANY CIRCUMSTANCES, OR ANY PART OF A REFUND TO INCLUDE FILING FEES AND PROCESS SERVICE FEES.** All fees are earned when paid. If I choose to stop my divorce or other action/documents I will not be entitled to any refund of any part of my fees, under any circumstances. This includes court costs, process service and all other fees.

### Payment Policy

I understand that when I submit my credit card information over the Internet, phone, or in Discount Divorce Professionals, LLC. office, this is assumed to be a credit card authorization for the service requested, the same as if I had personally signed a credit card receipt. An additional credit card authorization (requiring a signature to be returned by fax or mail) may or may not be required, at Discount Divorce Professionals, LLC.'s discretion.

I understand that if I do not pay in full at my initial appointment then Discount Divorce Professionals, LLC. will charge my credit/debit card on the agreed upon dates and that I cannot change those dates for any reason. Furthermore, if any payment becomes past due then there will be a \$25 late fee accrued every 30 days until paid in full. I understand that if I am late on any payment all fees shall be due immediately. Late fees shall not exceed \$100. If there is no schedule of agreed upon dates then any remaining balance is due within 30 days of this "Agreement & Reciept".

I also understand that all payments can be made via the Internet at DiscountDivorceAZ.com as well.

### Legal Advice

If you own an intrest in a buisness, 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.

X \_\_\_\_\_ Date \_\_\_\_\_  
Client's signature

