

WHAT YOU'LL NEED TO FILL THIS OUT:

- **Names and birthdates** of your **children** and **grandchildren**, if applicable.
- The **name and contact information** of the person you've chosen to **guardian of your child(ren)**, the **trustee(s)** of their estate, and **your personal representative/executor**

HELPFUL INFORMATION BEFORE YOU GET STARTED!

- This Will Questionnaire is NOT your Will. It will help prepare in the preparation of your Will.
- If you need more space to answer a question, attach a separate sheet and indicate the question, attach a separate sheet and indicate the question number to which it pertains.

PLEASE PRINT

es*tate n. Everything that you own at your passing after payment of debts and taxes. You will make decisions regarding the percentage share of your estate you wish to give your beneficiaries. And if you wish, you may leave specific items of property (car, investments, heirloom, etc.) or sums of money to your beneficiaries.

will n. A document which provides who is to receive your property, who will administer your estate, who will serve as guardian of your children, if applicable and other provisions.

1) Full name (first, middle, last)

All other names by which you have been known:

Age ____ Date of Birth (DOB) _____ Sex M F

2) Current residence

Street address _____ City _____

County or Parish _____ State ____ Zip _____

Home Phone _____ Alt Phone _____

3) If you are married, your spouse's full name: (first, middle, last, maiden)

Date of marriage _____ Place of marriage _____

Are you currently living with your present spouse? Y N

4) Do you and your spouse have a Prenuptial Agreement which identifies and dispose of separate spousal property? Y N N/A

5) If either you or your spouse has been divorced, please answer the following. If not applicable, please go to question #6.

Date of marriage _____

Date of divorce judgment _____

Court rendering judgment _____

Date of spouse's death (if applicable) _____

6) Have you or your spouse created any trusts or made gifts through trusts to others? If yes, describe and include a copy. If not applicable go to question #7.

7) Do you or your spouse except any inheritance? If yes, state from whom and how much. If not applicable, please go to question #8.

8) If you have children, including adopted children state the following for each child. If you do not have children, please go to question #15.

Full name	Son/Daughter	Date of birth	Child of current marriage? (Y/N)

9) a. Deceased biological or legally adopted children if applicable.

Full name	Son/Daughter	Date of death

b. Deceased child's living children if applicable:

Full name	Son/Daughter	Date of birth	Parent's Name

10) If you have stepchildren, do you want them treated the same as your natural born or legally adopted children in your Will? Y N N/A If yes, state the following for each:

Full name	Male/Female	Date of birth	Parent's Name

11) If you have grandchildren, state the following for each. If not, go to question #12.

Full name	Parent's Name	Grandson/Granddaughter	DOB	Living? (Y/N)

12) Are any of your children or other beneficiaries mentally or physically disabled or have special needs? Y N If so, note any special provisions:

If so, are they presently receiving, or do you anticipate that they may apply for, SSI benefits in the future?

Y N *Note: If you leave a bequest, not left to a qualified trust, the recipient might be disqualified from SSI benefits.*

13) If your children are under age eighteen (18), state the following for the person you wish to act as their **guardian** (custodian) in the event of your death or in case of the joint death of you and your spouse (if married). *You should obtain the consent of that person(s) before executing your will.* If you do not have any minor children, please go to question #15.

guard*i*an n. A person lawfully invested with the power, and charged with the duty, of taking care of the person who is incapable of doing so because of age or other incapacity.

Name(s): _____

Address: _____

Relationship: _____

trus*tee n. A person appointed to manage the financial affairs of the one who is legally incapable of doing so because of age or other incapacity

If at the time of your death the person(s), named above is/are unwilling to serve as guardian (custodian), please list an alternate:

Name(s): _____

Address: _____

Relationship: _____

14) Do you want the appointed guardian also to be the **trustee** (conservator) of any assets inherited by the minor children? Y N

If no, please list the person or entity you wish to act as their financial custodian, You should obtain the consent of that person or entity before executing your will.

Name(s) _____

Address _____

Relationship _____

Please list an alternate in case this person is unwilling or unable to serve:

Name(s) _____

Address _____

Relationship _____

At what age would you like your children to take control from the trustee of ay inherited assets? (Must be at least 18 years old.) _____ years old.

15) Indicate how you want your assets to pass when you die.

Please check the ONE option you prefer:

Option A I want my assets to pass to my spouse and children as follows:

To my spouse, if surviving.

- If my spouse predeceases me, my assets will be divided in equal shares to my children.
- If any of my children predecease me, that child's share shall be distributed to his or her children in equal shares.
- In the event my spouse and all of my children and descendants fail to survive me, I want my assets to be distributed as follows:

Option B I am unmarried with children and want my assets to pass as follows:

- In equal shares to my children.
- If one or more of my children predecease me, that child's share in my estate is distributed to his or her children in equal shares.
- In the event all my children and descendants fail to survive me, I want my assets to be distributed as follows:

Option C None of the above. I want my assets to pass as follows:

16) Do you wish to disinherit any children or grandchildren? If so, list their names here. If not applicable, please go to question #17.

17) If married and your spouse is still alive, do you want your spouse to serve as your **personal representative/executor***? Y N

Please list an alternate below. If not married or you wish to appoint someone other than your spouse please indicate below.

Full name _____

Address _____

Please list an alternate in case this person is unwilling or unable to serve:

Full name _____

Address _____

Do you wish to waive the **fiduciary bond** requirement? Y N

18) Many people make special provisions for family heirlooms, jewelry, or other items of special value to be distributed to friends or relatives. If you have such property and would like to leave it to a specific person, please complete the following.

Note: In question#15 you indicated how you would like your assets to pass. Please fill out this question ONLY if you desire items with specific or sentimental value be left to a specific person. (Include a separate sheet of paper if necessary.)

Item	Special Identifying Features	Recipient