



WILL QUESTIONNAIRE
 (Attach additional sheets if necessary)

Name(s)	
Address	
Phone No.	
Social Security No.	(for financial POA)

I am over 18 years old and of sound mind to make a Will.

Married? Yes No First marriage? Yes No

Marital property (or prenuptial or postnuptial) agreement in place? Yes No

Children (including adopted)? None
 Names & Ages:

Do you own a business? Name: _____ LLC Corp. Partnership

Do you want your grandchildren to receive a parent's share if your child predeceases you? yes no

What is the approximate value of your GROSS estate (includes all assets – life insurance, pension, trust assets, 401K accounts, IRA accounts, bank accounts, real estate, etc.):

Real Estate (consider Transfer on Death deed):	\$
Life Insurances (consider beneficiaries):	\$
Pension/IRA/401K (consider beneficiaries):	\$
Cash Accounts (transfer on death forms @ bank):	\$
Expected inheritances?:	\$
Trust Assets?: type: _____	\$
Miscellaneous Assets:	\$
Other: type: _____	\$
TOTAL:	\$

If total value of your gross estate is under \$1,000,000, a basic will and power of attorney documents is most likely appropriate for you. If the total of your gross estate exceeds \$1,000,000 (or if other special concerns), you may want to have a consultation on how to more effectively distribute assets and protect against estate taxes upon death.

How would you like your assets distributed upon death? If passing to more than one person, please make note if it is in equal shares or specify each person's share by using a percent (%).
Note: Assets such as life insurance, pensions, and any assets title in joint tenancy with right of survivorship do not pass through your will. They pass directly upon your death. We can suggest changes to your beneficiary forms if using a Children's Trust to have all assets pass to the Children's Trust.



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- All to spouse, then children if spouse dies before me or at same time.
- 1/2 to spouse and 1/2 to children from prior marriage (will not apply to home if joint).
- All to children equally and to their children if my child dies before me.
- Other (charities, etc.):

Personal Representative

Who do you wish to be your Personal Representative (person to handle administration of your estate and distribute assets, etc.). Name the primary person and then name one or two alternate people (in case the first person cannot act).

Primary	Name(s)	
	Relationship	; City/State

Secondary	Name(s)	
	Relationship	; City/State

	Name(s)	
	Relationship	; City/State

Health Care Power of Attorney/Living Will

Who do you wish to be your agent (person to make health care decisions for you in the event that you are incapacitated). Name the primary person and then name one or two alternate people (in case the first person cannot act).

Primary	Name(s)	
	Relationship	; City/State

Secondary	Name(s)	
	Relationship	; City/State

	Name(s)	
	Relationship	; City/State

Durable Power of Attorney for Finance

Who do you wish to be your agent (person to make financial decisions for you in the event that you are incapacitated). Name the primary person and then name one or two alternate people (in case the first person cannot act).

Primary	Name(s)	
	Relationship	; City/State

Secondary	Name(s)	
	Relationship	; City/State

	Name(s)	
	Relationship	; City/State



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Guardian for Minor Children

A guardian is necessary for your minor children if you die while any of your children are under the age of 18 and their other parent is not alive or not able to take them. Same as above in _____ section.

Primary	Name(s)	
	Relationship	; City/State

Secondary	Name(s)	
	Relationship	; City/State

	Name(s)	
	Relationship	; City/State

What age or ages would you allow your children to receive their inheritance? Money will be available in trust for payment of college expenses, etc. E.g. half at age 25, remaining balance at 30 years.
Age(s):

Trustee for Children's Trust

If you pass prior to your children being an age you designate for them to receive their inheritance (e.g. 18, 25, 30, etc.) your estate can go into a Children's Trust. Who should oversee those funds until the children reach the age(s) you designate? Same list as listed above under _____ section.

Primary	Name(s)	
	Relationship	; City/State

Secondary	Name(s)	
	Relationship	; City/State

	Name(s)	
	Relationship	; City/State

Please check additional documents you would like (both included in Will package cost):

- Power of attorney for health care (included living will/life support questions).
- Power of attorney for finances.

Please check any other special circumstances that exist and explain:

- Disabled children/beneficiaries:
- Relatives who may challenge your will or state of mind?
- Concern about liability/creditors upon death:
- Undue influence exerted to create a will/name beneficiaries:
- Concern about how to title assets or how assets pass upon death:

Other Information/Special Circumstances/Requests/Questions/Concerns: (please describe).