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WILL QUESTIONNAIRE

Client Name: _____ Date of Birth: _____

Address: _____

Phone#: _____ Email _____

Cell# _____ Social Security#: _____

Occupation _____

Spouse Name: _____ Date of Birth: _____

Cell# _____ Social Security# _____

Occupation: _____ Email _____

First marriage for Husband? Yes/No _____ First marriage for Wife? Yes/No _____

List names and dates of birth of children:

_____	DOB: _____
_____	DOB: _____
_____	DOB: _____
_____	DOB: _____
_____	DOB: _____
_____	DOB: _____

Do you want to leave your entire estate to your spouse, if they survive you? Y/N

Do you want to leave all of your assets to your children in equal shares if your spouse does not survive you? Y/N

If any of your children should die before you, do you want the deceased child's share to be divided equally among his/her children? Y/N

Do you want to name your spouse as your Personal Representative (Executor/Executrix) for your Estate? Y/N If, not, please name the person whom you want to serve as Personal representative:

Name and Address of Personal Representative for:

Husband: _____

Wife: _____

It is recommended to name an Alternate Personal Representative, in the event your first choice is unable to serve. Please name an Alternate Personal Representative for:

Name and Address of Alternate Personal Representative:

Husband: _____

Wife: _____

If you have children who are under the age of 18, it is recommended that you name a Guardian and an alternate Guardian of the person for your minor children.

Please name a Guardian and Alternate Guardian for:

Husband: _____

Alternate: _____

Wife: _____

Alternate: _____

If you have children who are under 18, it is recommended that you name a Guardian of the Estate of the minor children.

Please name a guardian of the estate of minor children and an Alternate:

Husband: _____

Alternate: _____

Wife: _____

Alternate: _____

If you have minor children at the time that both you and your spouse die, it is prudent to establish a trust in your will to name someone, or a trust company or bank, to protect the young beneficiary's assets for as long a period as you believe is in the child's best interest.

Please name a Trustee and an Alternate Trustee, if you have minor children, or children too young to receive their inheritance:

Husband's Trustee: _____

Alternate: _____

Wife's Trustee: _____

Alternate: _____

ASSET SUMMARY

	SPOUSE	SPOUSE	JOINT	TOTAL
Cash/Money Market/Checking Savings	\$ _____	\$ _____	\$ _____	\$ _____
Stock/Bonds/ Securities	\$ _____	\$ _____	\$ _____	\$ _____
IRA/401(k)/ Retirement Benefits	\$ _____	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____	\$ _____
Business Interest/ Partnerships	\$ _____	\$ _____	\$ _____	\$ _____
<u>Real Estate Properties</u>				
Primary Residence	\$ _____	\$ _____	\$ _____	\$ _____
Vacation Residence	\$ _____	\$ _____	\$ _____	\$ _____
Investment	\$ _____	\$ _____	\$ _____	\$ _____
<u>Other Property Values</u>				
Automobiles	\$ _____	\$ _____	\$ _____	\$ _____
Boats, Etc.	\$ _____	\$ _____	\$ _____	\$ _____
Misc'l	\$ _____	\$ _____	\$ _____	\$ _____
<u>Asset Totals</u>	\$ _____	\$ _____	\$ _____	\$ _____

LIABILITY SUMMARY

	SPOUSE	SPOUSE	JOINT	TOTAL
Personal Loans	\$ _____	\$ _____	\$ _____	\$ _____
Margins, Etc.	\$ _____	\$ _____	\$ _____	\$ _____
Insurance Loans	\$ _____	\$ _____	\$ _____	\$ _____
Business Loans	\$ _____	\$ _____	\$ _____	\$ _____
Credit Cards	\$ _____	\$ _____	\$ _____	\$ _____
 <u>Real Estate</u>				
<u>Mortgages</u>				
Primary Residence	1 ^{st.} \$ _____	1 ^{st.} \$ _____	1 ^{st.} \$ _____	1 ^{st.} \$ _____
	2 ^{nd.} \$ _____	2 ^{nd.} \$ _____	2 ^{nd.} \$ _____	2 ^{nd.} \$ _____
Vacation Residence	1 ^{st.} \$ _____	1 ^{st.} \$ _____	1 ^{st.} \$ _____	1 ^{st.} \$ _____
	2 ^{nd.} \$ _____	2 ^{nd.} \$ _____	2 ^{nd.} \$ _____	2 ^{nd.} \$ _____
Investment	\$ _____	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____	\$ _____
 <u>Other Property</u>				
<u>Loans</u>				
Automobiles	\$ _____	\$ _____	\$ _____	\$ _____
Boats, Etc.	\$ _____	\$ _____	\$ _____	\$ _____
Miscellaneous	\$ _____	\$ _____	\$ _____	\$ _____
<u>Liability Totals</u>	\$ _____	\$ _____	\$ _____	\$ _____

NET WORTH SUMMARY
(NET WORTH=ASSET TOTALS-LIABILITY TOTALS)

Asset Totals	\$ _____	\$ _____	\$ _____	\$ _____
Liability Totals	\$ _____	\$ _____	\$ _____	\$ _____
<u>Net Worth Totals</u>	\$ _____	\$ _____	\$ _____	\$ _____

NOTES: