

WILL QUESTIONNAIRE

The following information will be used to create your will(s). Please provide answers to these questions.

1. What is your full name, date of birth, social security number and address?
2. What is your spouse's full name, date of birth, social security number and address?
3. What are the full names, dates of birth for each of your children and addresses for each if they do not live with you?
4. If this is not your first marriage, list your former spouse's name and your children from that marriage.
5. Provide the same information for your present spouse as that requested in no. 4.
6. If any of the above children are adopted, indicate which ones and by whom.
7. What is the name, address and telephone of the person you would like to take care of your last affairs in the event of your death? This person will be your personal representative (executor). It is helpful if this person resides in the same state.
8. Provide the same information for your second choice if the first choice cannot serve.
9. If the first or second choices for executor are different for your spouse, provide the information regarding your spouse's choices.
10. Unless you do not so desire, a trust will be created for your minor children to provide for their welfare in general until the youngest reaches what age? (21 generally recommended)
11. If neither you nor your spouse are alive, who do you want to be the legal guardian for your children? (Generally, the children will reside with this person) List your first choice by name, address and telephone.
12. What is the name, address and telephone for your second choice to be the legal guardian for your children?
13. Do you want someone different from the guardian to control the money which will be in the trust created for the welfare of the children? (This person will be called the trustee). If so, please list the name address and telephone for this person?
14. If you wish to have a different trustee, what is the name, address and telephone for your second choice?
15. If you don't fully trust your executor, guardian or trustee and want any of them to post bonds and make regular accountings to a court of their actions, please indicate. (Note that each is legally entitled to some fees

for their services and these precautions will result in some erosion of the money you leave for the children)

16. If you specifically wish to disinherit anyone, identify them and indicate their relationship to you.

17. Although generally it is advisable not to attempt to enumerate the various items that will make up your estate, if there are specific items that you wish to leave to certain individuals, list them below or on a separate piece of paper, being certain to fully identify the individuals by name.

18. You will need three witnesses to be present with you when you sign and have each will notarized. If you do this in our office, Thomas Howard can be one witness. Sylvia will notarize the signatures. The remaining witnesses must not be individuals who benefit from the will. Please identify them by name and address below.

19. Do you have special concerns or instructions?

20. What is the approximate total value of your estate? More than \$750,000?

21. If you have life insurance, list the amounts and primary and contingent beneficiaries for each policy.