

LAURA W. ANDERSON, ESQ LLC

Please be advised that this questionnaire is designed to assist us in creating documents on your behalf and is not a substitute for individualized legal advice.

WILL QUESTIONNAIRE

- 1. Your Name: _____
Social security number _____-_____-_____ DOB: _____
- 2. Spouse: _____
Social security number _____-_____-_____ DOB: _____
- 3. Names of children and other beneficiaries (indicate if a minor)

- 4. Your Address: _____
Contact number: (____)_____

<u>Existing Estate Planning:</u>	<u>You</u>	<u>Spouse</u> <input type="checkbox"/> NA
Will Date: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Trust Date: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Power of Attorney Date: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Health Care Proxy Date: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Living Will Date: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Long-Term Care Insurance Daily benefit: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Is there anyone in your family with special needs or that requires special consideration?

NOMINATIONS

Your executor will be responsible for collecting the assets of your estate, carrying out the directions contained in your will, ensuring that your will is properly probated, and filing any tax returns which may be due.

Your trustee will be responsible for investing any assets held in trust, preserving such assets for the beneficiaries of the trust, and distributing such assets to the beneficiaries according to the directions contained in your will or any trust agreement which you might execute.

The guardian of the person for your minor children will assume responsibility for such children in the event that both of you die before your children reach the age of 18.

The guardian of the property for your minor children will assume responsibility for the property of such children in the event that both of you die before your children reach the age of 18.

Discuss the above selections with the individuals named before your first conference if possible. While a fiduciary should be a competent, responsible person, he or she need not have expertise in any of the areas mentioned, because he or she may always seek competent professional advice with respect to his or her duties and responsibilities.

5. Please indicate your preference for:

a. Executor: _____, Relationship _____
Alternate: _____, Relationship _____

b. Trustee: _____
Alternate: _____

c. If minor children:
Guardian of the Person: _____,
Relationship _____

Alternate: _____
Guardian of the Property: _____
Alternate: _____

DISTRIBUTION

6. In mutual wills, often all of your property is bequeathed to your spouse; however, this is not a requirement.

a. If your spouse predeceases you, please list how you would like your estate distributed?

b. If you wish any of your property to pass specifically to an individual, please list that item and the beneficiary?

7. If you are not married and/or this is not a mutual will, please list how you would like your estate distributed.

8. If a trust is established for your minor children, at what age do you want your children to receive their property outright (free of trust)?

9. Will the total liquidated value of your estate, including proceeds from life insurance, bank accounts, and retirement accounts, be over one million dollars at the time of your passing?

You should know that the distribution of funds from life insurance policies, bank accounts, and retirement accounts will not be distributed under your Last Will and Testament. You must make those elections directly with those institutions; however, you can establish your beneficiary under these accounts as your estate or a trust if you so choose.

Please be aware that you may wish to consult a tax professional concerning estate tax matters.