

Form 1-1 Estate Planning Questionnaire

The following information will help me advise you of your estate planning options and prepare your documents quickly and accurately. The more information you can provide, the more efficient the planning process will be.

1. Full Name (as you will sign your will) _____

a. Address _____

b. City _____ State _____ County _____

c. Phone Number _____

2. Marital History

a. Are you currently married? Yes _____ No _____

i. Date and state of marriage: _____

ii. Name of Spouse: _____

b. Widowed? Yes _____ No _____

i. Name of Deceased Spouse: _____

c. Divorced? Yes _____ No _____

i. Name of Ex-spouse: _____

3. Children

a. Name

i. _____

ii. _____

iii. _____

iv. _____

v. _____

vi. _____

4. Executors

Your executor is responsible for probating your will and distributing your assets to your beneficiaries. Married persons often appoint their spouses as primary executor. Many banks and other institutions will serve as executor for a fee, but often it is best to appoint one of your heirs who is willing to serve for free.

If you have minor children, you should appoint a guardian to take care of them if both their parents die before they reach age 18 (you can also appoint a married couple as co-guardians). You must also appoint a trustee to manage any money the children inherit. The trustee and the guardian are frequently the same person; if you prefer to appoint

different people to these posts, please make a note in the margin. If you wish to appoint more alternates than the space below allows, please use the back of this sheet.

a. Primary Executor

i. Name _____

b. Alternative Executor

i. Name _____

c. Alternative Executor

i. Name _____

5. Distribution of Estate

If you wish to leave your entire estate to one person, please list that person in the space below:

Name: _____ Relation to Testator: _____

Real Property: Please describe (address/city/state/zip) any real property that will be distributed

If you are leaving your estate to one person, you may leave the rest of this section, and section 6 blank.

In the space below, please list any assets you wish to devise and the person you wish to leave the asset to. For example, if you wish to leave your home to a child, list the full address of the home and the full name of the child.

a. Asset: _____

i. Heir _____ Relation to Testator: _____

b. Asset: _____

i. Heir _____ Relation to Testator: _____

c. Asset: _____

i. Heir _____ Relation to Testator: _____

d. Asset: _____

i. Heir _____ Relation to Testator: _____

e. Asset: _____

i. Heir _____ Relation to Testator: _____

f. Asset: _____

i. Heir _____ Relation to Testator: _____

g. Asset: _____

i. Heir _____ Relation to Testator: _____

6. Remainder of Estate

In general, when someone devises specific assets in their estate, there is a large portion of the estate that is not specifically devised. That is called the remainder. Because it is best to devise the entire estate in order to avoid issues, please name the person you wish to leave the remainder of your estate to (If you have not devised your entire estate to one individual already):

Name: _____ Relation to Testator: _____

7. Funeral Plans

If you have any plans of where you would like to be buried, whether you would like to be cremated or not, please list those specifications below:

Will Deposit: It is very important to keep your will in a safe place because only the **ORIGINAL** copies are valid for probating. For a fee of \$25, you may deposit your will at the courthouse in the probate section. This is the safest place to leave your will. Another safe place to leave your will is a safety deposit box, if you have one. Leaving your will in your home without telling someone where it is runs the risk of it becoming lost or destroyed in fire or flood, so it is a good idea to take the time to consider your options and find a safe place to store your original will.

Will Package: In addition to your will, we offer a package that includes:

1. Declaration of Guardian

- a. Designates a guardian of your person and estate in the event that you become incapacitated or unable to make decisions.

2. Directive to Physician
 - a. Helps you communicate your wishes about medical treatment at some time in the future when you are unable to make your wishes known because of illness or injury.
3. Durable General Power of Attorney
 - a. Designates an Attorney-in-Fact to make decisions in regards to all aspects of your estate, including real property and finances.
4. HIPPA Release
 - a. Allows for important medical information to be released to a designated person in the event that an important medical decision need to be made while
5. Medical Power of Attorney
 - a. Gives the person you name as your agent the authority to make any and all health care decisions for you in accordance with your wishes, including your religious and moral beliefs, when you are no longer capable of making them yourself.