

**WILLS QUESTIONNAIRE**

**BASIC INFORMATION**

LEGAL NAME: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_

STREET ADDRESS: \_\_\_\_\_

CITY/STATE/ZIP: \_\_\_\_\_

COUNTY: \_\_\_\_\_

MAILING ADDRESS:  SAME AS ABOVE  OTHER: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

HOME PHONE: \_\_\_\_\_ WORK PHONE: \_\_\_\_\_ CELL PHONE: \_\_\_\_\_

**1. Do you have any prior Wills?**  YES  NO

**2. Are you married?**  YES  NO

**If yes, please provide spouse's information:**

SPOUSE'S LEGAL NAME: \_\_\_\_\_

SPOUSE'S ADDRESS:  SAME AS ABOVE  OTHER: \_\_\_\_\_

SPOUSE'S SOCIAL SECURITY # \_\_\_\_\_

SPOUSE'S HOME PHONE: \_\_\_\_\_ WORK PHONE: \_\_\_\_\_ CELL PHONE: \_\_\_\_\_

**3. Do you have children?**  YES  NO

**If yes, please list their names, birthdates and social security numbers:**

LEGAL NAME: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_ SOCIAL SECURITY # \_\_\_\_\_

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**WILLS QUESTIONNAIRE**

**CONTENTS OF YOUR ESTATE**

**4. REAL ESTATE**

**a) What property do you currently have that you would like disposed of?**

STREET ADDRESS: \_\_\_\_\_ COUNTY: \_\_\_\_\_

CITY/STATE/ZIP: \_\_\_\_\_

**b) Is this property your Residence?**       YES     NO

**c) Do you own it by yourself or jointly?**     I AM THE ONLY OWNER     I OWN IT JOINTLY

IF JOINTLY, PLEASE INDICATE WITH WHOM: \_\_\_\_\_ RELATIONSHIP: \_\_\_\_\_

**d) If the residence is owned jointly, your ownership interest will pass to your joint owner.**

PRESENT VALUE OF PROPERTY: \_\_\_\_\_

**e) Is there a mortgage or home equity loan against the property?**     YES     NO

IF YES, PLEASE STATE CURRENT BALANCE: \_\_\_\_\_

**5. OTHER REAL ESTATE**

**a) Do you own other real estate?**     YES     NO

STREET ADDRESS: \_\_\_\_\_ COUNTY: \_\_\_\_\_

CITY/STATE/ZIP: \_\_\_\_\_

**c) Do you own it by yourself or jointly?**     I AM THE ONLY OWNER     I OWN IT JOINTLY

IF JOINTLY, PLEASE INDICATE WITH WHOM: \_\_\_\_\_ RELATIONSHIP: \_\_\_\_\_

**d) If the residence is owned jointly, your ownership interest will pass to your joint owner.**

PRESENT VALUE OF PROPERTY: \_\_\_\_\_

**e) Is there a mortgage or home equity loan against the property?**     YES     NO

IF YES, PLEASE STATE CURRENT BALANCE: \_\_\_\_\_

**The same information will be needed for any other real estate that you own.**

**Do you have any other interests in real estate, e.g., leases, easements, etc.?**     YES     NO

**WILLS QUESTIONNAIRE**

**6. OTHER ASSETS**

**BANK ACCOUNTS**

TYPE	NAME OF INSTITUTION	ACCOUNT/POLICY #	TITLE	VALUE

**STOCKS/BONDS/MUTUAL FUNDS**

TYPE	NAME OF INSTITUTION	ACCOUNT/POLICY #	TITLE	VALUE

**RETIREMENT ACCOUNTS**

TYPE	NAME OF INSTITUTION	ACCOUNT/POLICY #	TITLE	VALUE

**TRUSTS**

TYPE	NAME OF INSTITUTION	ACCOUNT/POLICY #	TITLE	VALUE

**LIFE INSURANCE**

TYPE	NAME OF INSTITUTION	ACCOUNT/POLICY #	TITLE	VALUE

**POWER OF APPOINTMENT**

TYPE	NAME OF INSTITUTION	ACCOUNT/POLICY #	TITLE	VALUE

**7. SAFE DEPOSIT BOX**

a) Do you have a safe deposit box?  YES  NO

IF YES, PLEASE PROVIDE LOCATION: \_\_\_\_\_

IF YES, PLEASE INDICATE WHO HAS ACCESS: \_\_\_\_\_

**WILLS QUESTIONNAIRE**

**DISPOSITION OF YOUR ESTATE**

**8. HOUSEHOLD FURNISHINGS, ETC.**

a) Are there specific items of personal property, like family heirlooms, that you would want to leave to a specific person?

YES     NO

ITEM

NAME & ADDRESS

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

b) Who do you want to receive your other personal effects and household items?

ITEM

NAME & ADDRESS

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

c) Second Choice:

ITEM

NAME & ADDRESS

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**WILLS QUESTIONNAIRE**

**9. REAL ESTATE**

**a) Do you want your real estate to go to a specific person or be included with the other assets of your estate?**

SPECIFIC PERSON (please list below)     INCLUDED WITH OTHER ASSETS

FIRST CHOICE (please provide name and address of the person)

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SECOND CHOICE (please provide name and address of the person)

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**10. SPECIFIC GIFT/BEQUEST**

ITEM

NAME & ADDRESS

ITEM	NAME & ADDRESS
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**11. EVERYTHING ELSE**

FIRST CHOICE (please provide name and address of the person)

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SECOND CHOICE (please provide name and address of the person)

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**WILLS QUESTIONNAIRE**

**APPOINTMENT OF FIDUCIARY**

**12. EXECUTOR**

**a) Who would you like to be your Executor?**

FIRST CHOICE (please provide name and address of the person)

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**If that person does not survive you, who is your second choice?**

SECOND CHOICE (please provide name and address of the person)

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**b) Do you want your Executor to be compensated in any way for his or her efforts?**     YES     NO

**c) Do you want your Executor to post bond?**     YES     NO

**13. GUARDIAN**

**a) Do you have anyone for whom you need to make arrangements?**     YES     NO

This could include minor or disabled children, aged parents or other relatives or friends who depend on you for their care. If so, and they are unable to act on their own behalf either because of age or condition, you will need to name a guardian or a substitute guardian of the first person you name does not survive you.

**GUARDIAN OF THE ESTATE?**     YES     NO

FIRST CHOICE (please provide name and address of the person)

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SECOND CHOICE (please provide name and address of the person)

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**GUARDIAN OF THE PERSON?**     YES     NO

FIRST CHOICE (please provide name and address of the person)

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SECOND CHOICE (please provide name and address of the person)

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**WILLS QUESTIONNAIRE**

**14. TRUST**

a) Would you like to establish a trust for minor children or anyone else?  YES  NO

b) Would you like to leave in the trust?

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c) For whom?

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d) Who would you want to be named as Trustee and Alternate Trustee?

FIRST CHOICE (please provide name and address of the person)

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SECOND CHOICE (please provide name and address of the person)

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e) When would you like the trust to terminate?

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f) What would you like the trust to say?

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**WILLS QUESTIONNAIRE**

**g) Are there any special conditions you wish to place on the trustee?**

For example, if it is a trust for your children, do you have particular types of schools you wish them to attend or do you wish the trustee to seek at-home care for your parent rather than a nursing home arrangement? If you do not specify the conditions in your Will, the trustee will be free to respect or ignore your expressed wishes. You may wish to allow that discretion to react to changing circumstances or you may not.

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**h) How do you want the financial arrangements to work?**

Do you want the person you name as trustee to have full discretion over all funds, or do you want to establish a trust that will provide additional bureaucracy for your guardian to obtain funds but will also provide a check on the expenditure of the funds? Depending on who serves as Trustee, it could also entail fees.

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**i) Do you want your Trustee to be compensated in any way for his or her efforts?**     YES     NO

**MISCELLANEOUS**

**15. Would you like your Executor or Trustee to be able to seek assistance from professionals and other service people if he/she deems it necessary, such as attorneys, accountants, auction services (the fees would be paid from the estate)?**

YES     NO

**16. Would you like all the taxes on your estate paid out of the estate itself before distribution of your assets?**

YES     NO

**WILLS QUESTIONNAIRE**

**QUESTIONS TO THINK ABOUT**

**17. Do you want all of your property to go to the same person or group of people, such as your children?**

**18. Do you have specific bequests you wish to make to specific people?**

If so, are you certain or do you think you will change your mind over the years? For your information, specific bequests are the first things to be taken from your estate, e.g., if you leave \$1,000.00 to each of your nieces and nephews and you have so many that it uses all your assets, the person to whom you leave the remainder of your estate will get nothing.

**19. Do you want to give anything to charity?**

If so, what, e.g., specific possessions or money? If money, do you want it to be a direct gift or a trust. If a trust, who do you want to administer it?

**20. If any of the people or institutions to whom you wish to leave gifts do not survive you, what alternate gifts would you like to make?**

**21. Do you want to place any conditions on the gifts, such as to Mary, if she remains single at the time or to Joe, if he has completed college or is studying full time?**

If you establish conditions, you need to make alternate plans if the conditions are not met.

**22. Do you want to give your Executor permission to dispose of assets like clothing at their discretion rather than distributing them among your beneficiaries or requiring your Executor to dispose of them for the highest price and having the proceeds go to your beneficiaries?**

If you are naming a layperson as Executor (rather than an institution or a lawyer), this is sometimes a good idea. Your Executor is then free to give clothing or household goods that no one wants to charity.

**23. If you are leaving assets to children who may still be minors at the time, do you want to establish a trust rather than make a direct gift?**

If so, who do you want to act as Trustee? Who do you want as an alternate?

**24. Do you have any ownership interest in any businesses?**

If so, what form of business is it, e.g., sole proprietorship, partnership, corporation? Who do you wish to receive that interest? If there are owners other than you, what do the partnership or incorporation papers specify happens in the event one owner dies?

**25. Do you want to consider a financial or health care power of attorney or an advance health care directive, sometimes called a living will?**

For your information, assets such as life insurance policies and pension funds generally pass to their named beneficiaries outside the purview of your Will. You need to check the terms of these policies and programs to make sure they are set up as you wish them to be. In addition, you need to calculate the approximate value of your estate so we can discuss options available to avoid some estate taxes if appropriate.