

Will Questionnaire (Please do one per person)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

County of address \_\_\_\_\_

Spouse Name \_\_\_\_\_

Does the spouse get everything if they are still living? Yes No (Circle One)

Prior Spouse \_\_\_\_\_ Do they receive anything? Yes No

Children & Other heirs and amount or % to be distributed to them;

Name	Relationship	% distribution	Age
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Are any special items to going to someone in particular? Yes No (Circle One)

Name	Item
_____	_____
_____	_____
_____	_____

Are any heirs specifically not included?

Name	Relationship	Reason
_____	_____	_____

Executor(rix) Name (if other than surviving spouse) \_\_\_\_\_

Address \_\_\_\_\_

Alternate Executor \_\_\_\_\_

Address \_\_\_\_\_

If you want the powers of the Executor to be limited, state the limitation. Otherwise they will have full authority to finalize the estate, settle all claims and sell real property. (Note: Proceeds go to the estate)

\_\_\_\_\_

Bond required for the executor? Yes No (Circle One)

If you have children under the age of 18, and your spouse does not survive you;

1) You should establish a Trust for their money.

Do you want a trust? Yes No (Circle One)

If you are gone, who is the Trustee? \_\_\_\_\_, address \_\_\_\_\_

Alternate Trustee? \_\_\_\_\_, address \_\_\_\_\_

Age for receipt of distribution for the heirs? 18 21 25 other: \_\_\_\_\_

2) You should appoint a Guardian.

Who would you want as a Guardian? \_\_\_\_\_

Alternate Guardian? \_\_\_\_\_