

**WILL QUESTIONNAIRE**

Date: \_\_\_\_\_

**I. FAMILY INFORMATION**

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

Date of Birth: \_\_\_\_\_

Social Security No.: \_\_\_\_\_

Full Name of Spouse: \_\_\_\_\_

Date of Birth of Spouse: \_\_\_\_\_

Social Security Number of Spouse: \_\_\_\_\_

Date of Marriage: \_\_\_\_\_

Have either of you been married before? If so, state below the date of all prior marriages, names of prior spouses, and how each prior marriage was terminated (death, divorce, etc.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Full Name of Each Child

Date of Birth

\*

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

\* If any of these children are born of a prior marriage, please write in name of parents here.

**II. GENERAL INFORMATION**

Home Address:

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Home Telephone Number: \_\_\_\_\_

Employer: \_\_\_\_\_

Address:

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Business Telephone Number: \_\_\_\_\_

Is your spouse employed? Yes \_\_\_ No \_\_\_

If so, where? \_\_\_\_\_  
\_\_\_\_\_

Do you presently have a will? Yes \_\_\_ No \_\_\_

If so, where is the original? \_\_\_\_\_

Does your spouse have a will? Yes \_\_\_ No \_\_\_

If so where is the original? \_\_\_\_\_

Do you have a safe deposit box? Yes \_\_\_ No \_\_\_

If so, at what bank and branch? \_\_\_\_\_

**III. REAL ESTATE YOU OWN**

Residence Address:

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Names on Deed (Yours only or spouse?)

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When Purchased: \_\_\_\_\_

Purchase Price: \_\_\_\_\_

Is there a Mortgage? Yes \_\_\_ No \_\_\_

If so, to whom? \_\_\_\_\_

How much is the mortgage balance? \_\_\_\_\_

What is the current fair market value of your residence? \_\_\_\_\_

Do you and/or your spouse own any other real estate? If so, as to each parcel give the following information:

Address:

(1) \_\_\_\_\_  
 (2) \_\_\_\_\_  
 (3) \_\_\_\_\_  
 (4) \_\_\_\_\_  
 (5) \_\_\_\_\_

**IV. INVESTMENTS**

(A) As to all stocks owned, give the following information (list each separately):

Owner (H or W)	Company	No. of Shares	Date Acquired	Purchase Price	Present Market Value
1) _____	_____	_____	_____	_____	_____
2) _____	_____	_____	_____	_____	_____
3) _____	_____	_____	_____	_____	_____
4) _____	_____	_____	_____	_____	_____
5) _____	_____	_____	_____	_____	_____
6) _____	_____	_____	_____	_____	_____
7) _____	_____	_____	_____	_____	_____
8) _____	_____	_____	_____	_____	_____
9) _____	_____	_____	_____	_____	_____
10) _____	_____	_____	_____	_____	_____

(B) Do you own one or more businesses or an interest in one or more businesses?

Yes \_\_\_ No \_\_\_

If so, give the following information as to each business:

<u>% Interest</u>	<u>Corporation or Other</u>	<u>Name of Business</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

(C) As to all bonds, notes and mortgages owned by you and/or your spouse give the following information:

Face Value	Description	Date Acquired	Purchase Price
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

(D) Do you or your spouse own or have an interest in any other investments not stated above?

Yes \_\_\_ No \_\_\_

If so, give detailed information below as to each:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**V. LIFE INSURANCE**

List all policies covering you, your spouse and your children.

<u>Company</u>	<u>Policy No.</u>	<u>Owner H or W</u>	<u>First Beneficiary</u>	<u>Second Beneficiary</u>	<u>Face Value</u>
1) _____	_____	_____	_____	_____	_____
2) _____	_____	_____	_____	_____	_____
3) _____	_____	_____	_____	_____	_____
4) _____	_____	_____	_____	_____	_____
5) _____	_____	_____	_____	_____	_____
6) _____	_____	_____	_____	_____	_____
7) _____	_____	_____	_____	_____	_____

Any other life insurance? Yes \_\_\_ No \_\_\_

If so, give detailed information on separate sheet.

**VI. RETIREMENT BENEFITS**

(A) Death benefits payable under pension or profit-sharing plan, HR10 or IRA, or other:

<u>Description</u>	<u>Payable To</u>	<u>Amount</u>
1) _____	_____	_____
2) _____	_____	_____
3) _____	_____	_____
4) _____	_____	_____

**VII. PERSONAL PROPERTY**

(A) Do you own any single antique, item of jewelry, painting or the like worth \$5,000.00 or more?

Yes \_\_\_ No \_\_\_ If so, please list below:

<u>Description</u>	<u>Date</u>	<u>Cost</u>	<u>Present Value</u>
1) _____	_____	_____	_____
2) _____	_____	_____	_____
3) _____	_____	_____	_____
4) _____	_____	_____	_____

5) \_\_\_\_\_

(B) What is the value of all of the household goods, furniture and furnishings owned by:

You alone:

\_\_\_\_\_

Your spouse alone:

\_\_\_\_\_

You and spouse jointly:

\_\_\_\_\_

(C) List all cars, boats and aircraft or other vehicles owned by you or your spouse:

<u>Year/Make</u>	<u>Owner</u>	<u>Financed With</u>	<u>Value</u>
1) _____	_____	_____	_____
2) _____	_____	_____	_____
3) _____	_____	_____	_____
4) _____	_____	_____	_____
5) _____	_____	_____	_____
6) _____	_____	_____	_____
7) _____	_____	_____	_____

### **VIII. BANKS**

As to all checking and savings accounts, list:

<u>Bank or Savings and Loan</u>	<u>Owners of Account</u>	<u>Checking or Savings</u>	<u>Amount</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

### **IX. MONEY MARKET FUNDS**

<u>Where Held</u>	<u>Owners of Account</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**X. EXPECTED INHERITANCE**

If you anticipate any inheritance(s), give full information about it (them):

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**XI. OTHER**

List any and all other property or interest in property not already listed:

<u>Item</u>	<u>Owner</u>	<u>Value</u>
1) _____	_____	_____
2) _____	_____	_____
3) _____	_____	_____
4) _____	_____	_____
5) _____	_____	_____

**XII. DESIRED DISTRIBUTION**

How do you wish to dispose of your property (to be answered by both spouses):

<u>Husband</u>	<u>Wife</u>	
_____	_____	All to my spouse.
_____	_____	If my spouse is dead, then all to my children.
_____	_____	If any of my children are under age, then I want a trust for all of them until the youngest reaches a specified age.
_____	_____	That age is specified here.
_____	_____	Other (specify below)

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If neither my spouse nor any of my children survive me, then I want my estate distributed as follows:

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**XIII. PERSONS TO ASSIST**

I name the following persons to assist in the event of my death (to be answered by both husband and wife) :

<u>Husband</u>	<u>Wife</u>	
<hr/>	<hr/>	Name of executor (the person to administer my estate)
<hr/>	<hr/>	Name of contingent executor (if named executor cannot serve or is dead)
<hr/>	<hr/>	Name of Trustee (if I have a trust)
<hr/>	<hr/>	Name of contingent Trustee (if named Trustee cannot serve)
<hr/>	<hr/>	Name of person to care for my minor children if my spouse is dead (Guardian of Person)
<hr/>	<hr/>	Name of person to administer the property of my minor children if my spouse is dead (Guardian of the estate)