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WILL PLANNING QUESTIONNAIRE

Please answer what you can. "Not sure" or "please advise" is fine. Each spouse should complete a separate form. Attach a page if you need more space.

1. About you and your family

Full legal name

Other names used, if any

Date of birth

SSN: last four digits

Occupation / employer

Home address, including city, state and ZIP

County / state of residence

Phone

Email

Marital status

○ Single ○ Married ○ Divorced ○ Widowed ○ Domestic partnership

Spouse's full legal name, if applicable

Spouse's date of birth

List all children, including adult, adopted and deceased children, and children from prior relationships, even if you do not intend for them to inherit.

Child's full legal name	Date of birth	Relationship / other parent	Address / special circumstances

Family details: prior marriages (how / when ended), deceased children's descendants, stepchildren or uncertain parentage, support obligations, estrangement, or anyone to omit or treat differently.

2. People you would like to appoint

Name a primary choice and an alternate. Use full legal names and current contact information.

Executor (the person who handles your estate)

Choice	Full name / relationship	County / state	Phone / email
Primary			
Alternate			

Guardian for minor children, if needed

A guardian nomination applies if no surviving parent with superior legal rights is willing and able to serve.

Choice	Full name / relationship	County / state	Phone / email
Primary			
Alternate			

Advance directive for healthcare

A will does not authorize someone to act for you during your lifetime.

☐ Prepare ☐ Already have ☐ Discuss

Choice	Full name / relationship	Address	Phone / email
Primary			
Alternate			

Durable financial power of attorney

☐ Prepare ☐ Already have ☐ Discuss

Choice	Full name / relationship	Address	Phone / email
Primary			
Alternate			

Appointment questions or concerns (such as location, family conflict, compensation or bond)

3. Who should receive your property?

Describe the result you want; we will supply the legal wording. The remainder is what is left after debts, expenses, taxes and specific gifts are addressed.

If you are married and your spouse survives you:

- ○ All to my surviving spouse.
- ○ Specific gifts first, then the remainder to my surviving spouse.
- ○ Other / not sure (explain below).

Spouse instructions or questions, if any

If your spouse does not survive you, or you are unmarried:

- ○ Equally to my children, with a deceased child's share passing to that child's descendants.
- ○ To the people or family branches listed below, in the shares shown.
- ○ Other / not sure (explain below).

For either of the first two choices, a beneficiary who dies before you is replaced by their descendants, by family branch ("per stirpes"), unless you request a different result below.

Full name / family branch	Relationship	Share / %	If no living descendants, who receives that share?

Do you want a different result if a beneficiary dies before you?

○ No ○ Yes ○ Please advise

Different instructions or questions (for example, surviving children only, another recipient, or unequal shares)

4. Optional gifts and planning goals

List any specific gifts, including gifts to charities or non-family beneficiaries. For an organization, include its address or other identifying details. A gift of an item fails if you no longer own it at death.

Gift, amount or property	Recipient / relationship / identifying details	Alternate if recipient dies first / special instructions

Planning goals to discuss

Check any that apply.

- ☐ Inheritances paid in stages or at set ages.
- ☐ Protection from creditors, divorce, lawsuits, addiction or poor money management.
- ☐ A beneficiary receives or may need means-tested public benefits.
- ☐ Long-term or lifetime management for a beneficiary.
- ☐ Support a spouse and preserve an inheritance for children or another family line.
- ☐ A blended family, separate property or competing family obligations.
- ☐ Out-of-state real estate, significant business interests or assets needing coordinated management.
- ☐ Avoid probate, maintain privacy or plan for incapacity.
- ☐ None of these.
- ☐ Not sure / please advise.

A checked item does not automatically require a trust. For continuing management or protection, we ordinarily recommend a revocable living trust; a different engagement and fee may apply.

Tell us about any checked item or protection you would like.

Recent or expected changes: marriage, divorce, birth, adoption, death, disability, relocation, business ownership, litigation, substantial debt or inheritance. Write "None" if none.

5. Property and beneficiary coordination

A brief overview is enough; estimates are fine. You may provide recent statements instead of completing every row. This is a screening section, not a complete inventory.

A will controls probate property. Joint ownership and beneficiary designations may cause assets to pass outside your will. Retirement accounts ordinarily stay in your individual name. Do not change titles or beneficiaries until we review the complete plan.

Real estate

Property address / county / state	Current titled owner(s)	Approx. value	Mortgage / lender

Bank, brokerage, retirement, insurance and annuity assets

Institution / type of asset	Current owner(s)	Approx. value	Current beneficiary / joint owner

Business interests or other significant assets

Asset / entity	Owner(s) / co-owners	Approx. value	Agreement / special concern

Questions about ownership, beneficiaries or coordination with your will

6. Documents and next steps

Existing estate-planning documents (check any that apply):

- ☐ None
- ☐ Will
- ☐ Trust
- ☐ Power of attorney
- ☐ Advance directive
- ☐ Other

Other instructions or questions, or details about an existing document

Documents to share, if you have them

Please provide copies. Account numbers may be redacted to the last four digits.

- ☐ Estate-planning documents, including codicils, amendments, schedules and signature pages.
- ☐ Deeds; account statements and confirmations showing ownership and beneficiaries.
- ☐ Business formation, operating, partnership, buy-sell or shareholder agreements.
- ☐ Marriage, divorce, support or other agreements affecting property, beneficiaries or family obligations.

Client acknowledgment

This questionnaire gathers information for legal advice and document preparation. It is not a will, does not transfer property or change beneficiaries, and does not avoid probate. Complex distributions or probate-avoidance goals may call for a revocable living trust and a separate or expanded engagement.

Client signature

Date

Legal insurance plan - complete only if applicable

Plan provider (ARAG / LegalShield / CLC, etc.)

Covered member name

Member or policy number

Authorization / case / matter number

By initialing below, I understand that legal-plan coverage ordinarily covers only drafting covered estate-planning documents. The firm does not schedule or provide a signing appointment under the plan; I must arrange proper signing under the firm's written instructions. Deed preparation, title review or examination, recording or filing fees, certified copies, postage, courier charges and other expenses may be outside coverage. The firm may require advance reimbursement, direct payment or an additional retainer before deed work, title work or other uncovered services.

Legal-plan acknowledgment: initials

Referral source, if any