MANGRUM & MANGRUM, LLC
Attorneys at Law | 4842 LaVista Road | Tucker, Georgia 30084-4464

Telephone: (770) 496-1600 | Facsimile: (770) 559-0727 | Email: Contact@Mangrum-Law.com

LAST WILL AND TESTAMENT QUESTIONNAIRE

CONFIDENTIAL

How to Use This Questionnaire

This questionnaire is intended for a straightforward Georgia will plan. Please answer what you can. Write “unknown,” “unsure,” or “please advise” rather than leaving an important question blank.

A will controls only property that becomes part of your probate estate. It does not override a surviving joint owner or a valid beneficiary designation. A will also does not avoid probate.

Our standard will planning is generally appropriate when property will pass outright to a spouse, children, or other beneficiaries. If you want continuing trusts, staggered distributions, creditor or divorce protection, special-needs planning, blended-family protections, or detailed control after death, we will ordinarily recommend a revocable living trust and a separate trust-planning engagement.

A. CLIENT INFORMATION

Provide the information exactly as it appears on your identification and existing legal documents. Each spouse should complete a separate questionnaire.

1. Full Legal Name ____________________

2. Other Names Used (maiden name, prior married name, aliases)

____

3. Date of Birth ____________________

4. Last Four Digits of Social Security Number ____________________

5. Home Address ____________________

6. County and State of Residence ____________________

7. Email Address ____________________

8. Primary Telephone Number ____________________

9. Occupation / Employer ____________________

10. Referral Source or Legal Plan Information, if applicable

____

B. MARITAL AND FAMILY INFORMATION

List every child, including adult children, deceased children, adopted children, and children from prior relationships. Do not omit a child merely because you do not intend for that child to inherit.

11. Marital Status: ☐ Single ☐ Married ☐ Divorced ☐ Widowed ☐ Domestic Partnership

12. Spouse's Full Legal Name ____________________

13. Spouse's Date of Birth ____________________

14. Children and Other Descendants

Full Legal Name	Date of Birth	Relationship / Other Parent	Current Address	Special Circumstances?

Full Legal Name	Date of Birth	Relationship / Other Parent	Current Address	Special Circumstances?

15. Prior Marriages and Family Circumstances

Prior Spouse	How / When Marriage Ended	Children of That Relationship	Current Relationship or Concern

Family Information, Questions, or Concerns

Use this space to identify a deceased child, estranged relative, stepchild, adopted person, disputed parentage, pending divorce, support obligation, or anyone who may expect to inherit but whom you may wish to omit or treat differently.

C. EXECUTOR AND GUARDIAN APPOINTMENTS

The executor handles probate administration. We ordinarily recommend naming one primary executor and at least one alternate rather than requiring co-executors to act together.

16. Executor and Alternate Executor(s), in order of preference

Order	Full Legal Name	County / State	Relationship	Telephone / Email

17. Guardian for Minor Children, in order of preference

A guardian nomination is relevant only if a minor child has no surviving parent with superior legal rights who is willing and able to serve.

Order	Full Legal Name	County / State	Relationship	Telephone / Email

Questions or Concerns About Appointments
Use this space for questions about age, location, family conflict, compensation, bonding, or whether a proposed person is appropriate.

D. DISTRIBUTION OF YOUR PROBATE ESTATE

Describe the result you want. We will supply the legal language. The remainder, or "residuary estate," is what remains after enforceable debts, expenses, taxes, and specific gifts are addressed.

Georgia Per-Stirpes Distribution
For a typical family distribution, we ordinarily draft the will so that a deceased child's share passes to that child's descendants, per stirpes. In practical terms, each family branch receives the share the deceased beneficiary would have received. Unless you tell us otherwise, this questionnaire treats per-stirpes distribution as the default for descendants.

18. If you are married and your spouse survives you, how should your probate estate pass?

☐ All to my surviving spouse

☐ Specific gifts first, then the remainder to my surviving spouse

☐ Other or Unsure - explain below

First-Death Instructions, Questions, or Concerns

19. If your spouse does not survive you, or if you are unmarried, who should receive the remainder?

☐ Equally to my children, with a deceased child's share passing to that child's descendants, per stirpes

☐ In the percentages or shares listed below, with descendants of a deceased beneficiary taking that beneficiary's share per stirpes

☐ Other or Unsure - explain below

Beneficiary or Family Branch	Relationship	Share / Percentage	If No Living Descendants, Who Takes?

Beneficiary or Family Branch	Relationship	Share / Percentage	If No Living Descendants, Who Takes?

20. Do you want a distribution different from the per-stirpes default? ☐ No ☐ Yes ☐ Unsure / Please Advise

Requested Different Result or Questions
Examples: divide only among surviving children; exclude descendants of a deceased beneficiary; give that share to another named person; or use a different contingent beneficiary.

21. Specific Gifts

Specific gifts are optional. Use a general description when practical. A gift of a particular item fails if you do not own that item at death.

Description of Gift	Recipient	Relationship	Alternate Recipient if First Recipient Dies Before You

22. Charitable Gifts or Gifts to Non-Family Beneficiaries

Organization / Beneficiary	Address or Identifying Information	Amount, Percentage, or Property	Alternate or Special Instruction

Questions, Uncertainties, or Suggestions About Distribution

Use this space to explain unequal shares, family circumstances, beneficiaries you may wish to omit, competing options, or any result you want us to help structure.

E. SCREENING FOR TRUST-BASED PLANNING

A simple will is not the best instrument for every objective. Check every item that applies.

☐ I want a beneficiary to receive property in stages or only after reaching specified ages.

☐ I want an inheritance protected from creditors, divorce, lawsuits, addiction, or poor financial judgment.

☐ A beneficiary receives or may need means-tested public benefits.

☐ I want property managed for a beneficiary for many years or for the beneficiary's lifetime.

☐ I want to provide for my spouse while preserving the remainder for my children or another family line.

☐ I have a blended family, substantial separate property, or competing obligations to a spouse and descendants.

☐ I own real estate in more than one state, significant business interests, or assets requiring coordinated management.

☐ Avoiding probate, maintaining privacy, or planning for incapacity is an important objective.

☐ None of the above applies.

☐ Unsure / Please Advise.

Important Planning Expectation

Checking one or more of these items does not automatically require a trust. It does indicate that a simple will may not adequately accomplish the objective. When continuing management or protection is central to the plan, our ordinary recommendation is a revocable living trust rather than a complex will containing extensive testamentary trusts. Additional planning, drafting, and funding work may require a different engagement and fee.

Explain Any Checked Item or Requested Protection

F. ASSET AND BENEFICIARY-DESIGNATION COORDINATION

This is a screening section, not a complete asset inventory. A will ordinarily controls only probate assets titled in your individual name without a surviving joint owner or valid beneficiary designation.

Important Expectations

Jointly owned property, payable-on-death and transfer-on-death accounts, retirement accounts, life insurance, and annuities may pass outside the will. Their beneficiary designations can override the will. Retirement accounts ordinarily remain in the participant's individual name and are coordinated through beneficiary designations. Do not retitle assets or change beneficiaries until the complete plan has been reviewed.

23. Real Estate

Property Address	County / State	Current Titled Owner(s)	Approx. Value	Mortgage / Lender

24. Significant Bank, Brokerage, Retirement, Insurance, or Annuity Assets

List only enough information to identify beneficiary-designation or ownership issues. Recent statements may be provided instead.

Institution / Company	Type of Asset	Current Owner(s)	Approx. Value	Current Beneficiary / Joint Owner

25. Business Interests or Other Significant Assets

Asset / Entity	Ownership / Co-Owners	Approx. Value	Governing Agreement or Special Concern

G. INCAPACITY AND SUPPORTING DOCUMENTS

A will operates at death. It does not authorize anyone to act for you during your lifetime.

26. Advance Directive for Healthcare: ☐ Prepare ☐ Already Have ☐ Discuss

Primary Healthcare Agent ____

Address / Telephone / Email ____

____

Alternate Healthcare Agent ____

Address / Telephone / Email ____

____

27. Durable Financial Power of Attorney: ☐ Prepare ☐ Already Have ☐ Discuss

Primary Financial Agent ____

Address / Telephone / Email ____

____

Alternate Financial Agent ____

Address / Telephone / Email ____

____

H. ADDITIONAL PLANNING INFORMATION

28. Existing Estate-Planning Documents: ☐ None ☐ Will ☐ Trust ☐ Power of Attorney ☐ Advance Directive ☐ Other

Please provide complete copies, including all amendments, codicils, schedules, and signature pages.

29. Are there recent or expected changes involving marriage, divorce, birth, adoption, death, disability, relocation, business ownership, litigation, substantial debt, or an inheritance? ☐ No ☐ Yes ☐ Unsure

Explanation / Questions

30. Other Instructions, Questions, or Circumstances

Additional Information

I. DOCUMENTS TO PROVIDE

Please provide copies, not originals, unless requested. Account numbers may be redacted to the last four digits.

☐ Existing wills, trusts, amendments, codicils, powers of attorney, and advance directives

☐ Current deeds for real estate

☐ Recent statements showing title and beneficiary information for significant financial accounts

☐ Beneficiary-designation confirmations for retirement accounts, life insurance, annuities, POD accounts, and TOD accounts

☐ Business formation documents and any operating, partnership, buy-sell, or shareholder agreements

☐ Prenuptial, postnuptial, divorce, property-settlement, child-support, or other agreements affecting inheritance rights

☐ Any other document affecting ownership, beneficiary rights, or family obligations

Client Acknowledgment

I understand that this questionnaire gathers preliminary information for legal advice and document preparation. It is not a will, does not transfer property, does not change a beneficiary designation, and does not avoid probate. I understand that requests for continuing trusts, complex distribution controls, or probate-avoidance planning may lead the firm to recommend a revocable living trust and a separate or expanded engagement.

Client Signature ____

Date ____

Acknowledgement for Client with Legal Insurance Plan (ARAG / LegalShield / CLC)

By initialing below, I understand that my legal insurance plan ordinarily provides coverage only for the drafting of covered estate-planning documents. The firm does not schedule or provide a signing appointment under the legal plan. I am responsible for arranging for proper execution of the documents in accordance with the firm's written signing instructions. I further understand that deed preparation, title review or title examination, recording fees, filing fees, certified copies, postage, courier charges, and other out-of-pocket expenses may not be covered by my legal insurance plan. The firm may require advance reimbursement, direct payment, or an additional retainer before performing deed work, title work, or any service not covered by the plan.

LEGAL INSURANCE PLAN INFORMATION

Legal Plan Provider: ____

Name of Covered Member: ____

Member or Policy Number: ____

Authorization, Case, or Matter Number: ___________________________________

Acknowledgement (please initial): ______

Attorney Notes