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LAST WILL AND TESTAMENT QUESTIONNAIRE

A Last Will and Testament, more commonly referred to as a Will is simply a person's declaration of how he or she wants his or her property to be given out after their death. A Will allows you to make gifts. A will allows you to provide for your spouse, and similarly you can provide for your children. If you have minor children you get to decide who will raise them and who will have control over their inheritance. You get to decide at what age your children will inherit

In order to prepare your Will please provide the following information and return to me at your earliest convenience.

1. Please state your full legal name _____
2. Have you ever been known by any other name(s), if yes, please state _____
3. What is your current address _____

4. What is your phone number (include home, cell and work) ? _____

5. Are you a member of a Union, if yes, which one _____
6. Are you currently married? _____
7. If yes, what is your spouse's name? _____
8. Do you have any children, if so what are their names, ages and addresses _____



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9. Are any of your children from a previous marriage or relationship? _____
10. Have you ever been or are you currently divorced and/or legally separated? _____
11. Does your divorce and/or separation agreement require you to include your former spouse in your Will? _____
12. Have you ever written a Will before? _____
13. Do you have any special burial requests? _____
14. Who would you like to name as the Executor of your estate. An Executor is the person you select to carry out your final wishes as stated in your Will. Please give that person's name and address _____
15. If the person you have selected to be your Executor cannot fulfill their obligation who would you like to select as your alternate Executor? Please give that person's name and address. _____
16. If you have minor children, who would you like to name as the Guardian over your children? Please give their name and address _____
17. If a minor inherits under your Will, the law requires that the inheritance be held in a trust for them until they reach majority. At what age would you like majority to be, 18, 21, 25,30 or some other age? _____
18. If the person you have selected to be the Guardian over your minor children cannot fulfill their obligations who would you like to select as the alternate Guardian? Please state their name and address _____
19. Would you like to make any specific gifts in your will? If so, please state:

20. What would you like to do with the remainder of your assets not listed as a gift in question 17



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above? _____
