



## Will Questionnaire

Client Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Phone#: \_\_\_\_\_ Email \_\_\_\_\_  
Cell# \_\_\_\_\_ Social Security#: \_\_\_\_\_  
Occupation \_\_\_\_\_  
Spouse Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Cell# \_\_\_\_\_ Social Security# \_\_\_\_\_  
Occupation: \_\_\_\_\_ Email \_\_\_\_\_  
First marriage for Husband? Yes/No \_\_\_\_\_ First marriage for Wife? Yes/No \_\_\_\_\_

List names and dates of birth of children:

_____	DOB: _____
_____	DOB: _____
_____	DOB: _____
_____	DOB: _____
_____	DOB: _____
_____	DOB: _____

Do you want to leave your entire estate to your spouse, if they survive you? Y/N

Do you want to leave all of your assets to your children in equal shares if your spouse does not survive you? Y/N

If any of your children should die before you, do you want the deceased child's share to be divided equally among his/her children? Y/N

Do you want to name your spouse as your Personal Representative (Executor/Executrix) for your Estate? Y/N If, not, please name the person whom you want to serve as Personal representative:

Name and Address of Personal Representative for:

Husband: \_\_\_\_\_

Wife: \_\_\_\_\_

It is recommended to name an Alternate Personal Representative, in the event your first choice is unable to serve. Please name an Alternate Personal Representative for:

Name and Address of Alternate Personal Representative:

Husband: \_\_\_\_\_

Wife: \_\_\_\_\_

If you have children who are under the age of 18, it is recommended that you name a Guardian and an alternate Guardian of the person for your minor children.

Please name a Guardian and Alternate Guardian for:

Husband: \_\_\_\_\_

Alternate: \_\_\_\_\_

Wife: \_\_\_\_\_

Alternate: \_\_\_\_\_

If you have children who are under 18, it is recommended that you name a Guardian of the Estate of the minor children.

Please name a guardian of the estate of minor children and an Alternate:

Husband: \_\_\_\_\_

Alternate: \_\_\_\_\_

Wife: \_\_\_\_\_

Alternate: \_\_\_\_\_

If you have minor children at the time that both you and your spouse die, it is prudent to establish a trust in your will to name someone, or a trust company or bank, to protect the young beneficiary's assets for as long a period as you believe is in the child's best interest.

Please name a Trustee and an Alternate Trustee, if you have minor children, or children too young to receive their inheritance:

Husband's Trustee: \_\_\_\_\_

Alternate: \_\_\_\_\_

Wife's Trustee: \_\_\_\_\_

Alternate: \_\_\_\_\_

Do you want your estate to be responsible for all inheritance taxes? Y/N

Do you own any digital assets or have online financial or social media accounts? Y/N

If so, do you want to prepare a Virtual Assets Instruction Letter? Y/N

Virtual Assets are defined as files stored on digital devices, including but not limited to desktops, laptops, tablets, peripherals, storage devices, mobile telephones, smartphones, and any similar digital device which currently exists or may exist as technology develops. The term "digital assets" also includes but not limited to emails received, email accounts, digital music, digital photographs, digital videos, software licenses, social network accounts, file sharing accounts, financial accounts, domain registrations, DNS service accounts, web hosting accounts, tax preparation service accounts, online stores, affiliate programs, other online accounts and similar digital items which currently exist or may exist as technology develops or such comparable items as technology develops, regardless of the ownership of the physical device upon which the digital item is stored.

## ASSET SUMMARY

	SPOUSE	SPOUSE	JOINT	TOTAL
Cash/Money Market/Checking Savings	\$ _____	\$ _____	\$ _____	\$ _____
Stock/Bonds/ Securities	\$ _____	\$ _____	\$ _____	\$ _____
IRA/401(k)/ Retirement Benefits	\$ _____	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____	\$ _____
Business Interest/ Partnerships	\$ _____	\$ _____	\$ _____	\$ _____
<u>Real Estate Properties</u>				
Primary Residence	\$ _____	\$ _____	\$ _____	\$ _____
Vacation Residence	\$ _____	\$ _____	\$ _____	\$ _____
Investment	\$ _____	\$ _____	\$ _____	\$ _____
<u>Other Property Values</u>				
Automobiles	\$ _____	\$ _____	\$ _____	\$ _____
Boats, Etc.	\$ _____	\$ _____	\$ _____	\$ _____
Misc'l	\$ _____	\$ _____	\$ _____	\$ _____
<u>Asset Totals</u>	\$ _____	\$ _____	\$ _____	\$ _____

## LIABILITY SUMMARY

	SPOUSE	SPOUSE	JOINT	TOTAL
Personal Loans	\$ _____	\$ _____	\$ _____	\$ _____
Margins, Etc.	\$ _____	\$ _____	\$ _____	\$ _____
Insurance Loans	\$ _____	\$ _____	\$ _____	\$ _____
Business Loans	\$ _____	\$ _____	\$ _____	\$ _____
Credit Cards	\$ _____	\$ _____	\$ _____	\$ _____
<u>Real Estate Mortgages</u>				
Primary Residence	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____
	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____
Vacation Residence	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____	1 <sup>st</sup> : \$ _____
	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____	2 <sup>nd</sup> : \$ _____
Investment	\$ _____	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____	\$ _____
<u>Other Property Loans</u>				
Automobiles	\$ _____	\$ _____	\$ _____	\$ _____
Boats, Etc.	\$ _____	\$ _____	\$ _____	\$ _____
Miscellaneous	\$ _____	\$ _____	\$ _____	\$ _____
<u>Liability Totals</u>	\$ _____	\$ _____	\$ _____	\$ _____

**NET WORTH SUMMARY**  
**(NET WORTH=ASSET TOTALS-LIABILITY TOTALS)**

Asset Totals	\$ _____	\$ _____	\$ _____	\$ _____
Liability Totals	\$ _____	\$ _____	\$ _____	\$ _____
<u>Net Worth Totals</u>	\$ _____	\$ _____	\$ _____	\$ _____

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NOTES:



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*Kindly contact us to set up an appointment for your initial estate planning consult.*