

**INFORMATION NEEDED TO DRAFT WILL**

(The information requested in this questionnaire is necessary to prepare your Will, and will be held strictly confidential.)

1. Full legal name: \_\_\_\_\_  
Other name as used in some assets: \_\_\_\_\_
2. Birth date: \_\_\_\_\_ Social Security Number: \_\_\_\_\_
3. Address: \_\_\_\_\_  
City State Zip Code  
Mailing Address: (If Different) \_\_\_\_\_
4. Telephone number: Home: \_\_\_\_\_ Work: \_\_\_\_\_
5. Spouse's Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Birth date: \_\_\_\_\_ Social Security Number: \_\_\_\_\_
6. Names and birth dates of children:  
Child: Name: \_\_\_\_\_ Age: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relation to you: \_\_\_\_\_ Married: \_\_\_\_\_ Children: \_\_\_\_\_  
Child: Name: \_\_\_\_\_ Age: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relation to you: \_\_\_\_\_ Married: \_\_\_\_\_ Children: \_\_\_\_\_  
Child: Name: \_\_\_\_\_ Age: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relation to you: \_\_\_\_\_ Married: \_\_\_\_\_ Children: \_\_\_\_\_  
Child: Name: \_\_\_\_\_ Age: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relation to you: \_\_\_\_\_ Married: \_\_\_\_\_ Children: \_\_\_\_\_

7. Any deceased children? \_\_\_\_\_ Name: \_\_\_\_\_

8. Please indicate the general scheme as to how you want your estate to be distributed:

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9. Any other special bequests, conditions, terms, etc:

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10. Trust provisions, distributions, etc:

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11. **Who will settle your estate? (Executor):**

Executor: \_\_\_\_\_ Relation: \_\_\_\_\_

Address: \_\_\_\_\_

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

Address: \_\_\_\_\_

2nd Alternate: \_\_\_\_\_

Address: \_\_\_\_\_

12. **If any trust is created, who will be trustee?**

Trustee: \_\_\_\_\_

Address: \_\_\_\_\_

Alternative: \_\_\_\_\_

Address: \_\_\_\_\_

13. **If you have minor children and you and your spouse die before they become of age who will raise them (guardian of the person) and who will hold their property (guardian of the estate) until the minor or minors become of age:**

Guardian: \_\_\_\_\_ Relation: \_\_\_\_\_

Address: \_\_\_\_\_

Alternative: \_\_\_\_\_ Relation: \_\_\_\_\_

Address: \_\_\_\_\_

14. **Where are your legal records or documents to be kept?**

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