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WILL AND TRUST QUESTIONNAIRE

Please provide the following information and any additional information you believe will either be useful or that will assist us in preparing wills and trusts for you. If you require more space, use the section following labeled **ADDITIONAL INFORMATION** and/or as many additional pages of the same size as needed.

Please provide your COMPLETE NAME, and other names you have been known by, as well as your current address, social security number and date of birth. If married, provide the same information for your spouse. Name Spouse Address Address Address Address Social Security Number & Date of Birth Social Security Number & Date of Birth List below the COMPLETE NAMES, social security numbers and dates of birth of all of your children. If any children are no longer living with you, you should also list their current address. Name Spouse Address Address Address Address Social Security Number & Date of Birth Social Security Number & Date of Birth Name Spouse Address Address Address Address Social Security Number & Date of Birth Social Security Number & Date of Birth Provide the name(s) and address(es) of the person or persons you would nominate to serve as **EXECUTOR** of your estate. Also provide the same information for the person or persons you would nominate in the event that your first choice is unable or unwilling to serve.

Alternate

Name

WILL AND TRUST QUESTIONNAIRE PAGE 2 Address Address Address Address If you have children who are minors, list the name(s) and address(es) of the persons you would choose to serve as the **GUARDIAN OF THE PERSON** of your children. Name Alternate Address Address Address Address If you have children who are minors, list the name(s) and address(es) of the person or persons you would choose to serve as the **GUARDIAN OF THE PROPERTY** of your children. Name Alternate Address Address Address Address State the manner in which you desire that your HOUSEHOLD GOODS AND PERSONAL EFFECTS be distributed. Include any special provisions for specific items such as automobiles, stocks and jewelry. Describe any REAL ESTATE OR REAL PROPERTY INTERESTS that you own and any specific provisions you desire for the distribution of the same. If you wish that your real estate be distributed with the balance of your estate, you may so indicate here.

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List below any specific bequests of money or property and all charitable gifts that you wish to make. Be sure to include the
COMPLETE NAME and current address for any recipient who is not a spouse or child.
State the manner in which you wish the BALANCE OF YOUR ESTATE to be distributed. If you wish to leave property to anyone other than your spouse and children, please provide the COMPLETE NAME and current address for all such recipients. Include in this provision, any wishes you might have for the distribution of property in the event that any of the persons who are to receive a portion of your estate predecease you. Such as to their children or to the remaining heirs or to a charity.

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ADDITIONAL INFORMATION