

Simple Will Questionnaire
(No Trust Provisions)

1. Testator or Testatrix's ("Testator" hereinafter) name as used in everyday life, such as on driver's license or payroll records.
2. Testator's residence address. Be sure to include a city and county.
3. Mailing address if different from above.
4. Home and work phone and fax numbers.
5. City and date of birth.
6. Name as shown on birth certificate.
7. Other names used during life.
8. Social Security number of testator and spouse.
9. Name and address of father. If deceased, indicate city and year of death and whether a probate proceeding was held.
10. Maiden name of mother.
11. Current name of mother.
12. Name and address of mother. If deceased, indicate city and year of death and whether a probate proceeding was held.
13. Names of deceased brothers and sisters, including half-brothers and half-sisters. Indicate whether deceased brothers and sisters left living children and their names and addresses and approximate ages of their children.
14. Names and addresses of living siblings, including half-brothers and half-sisters. Indicate names and approximate ages of their children.
15. Name of spouse and date and place of marriage.

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16. Names and dates of birth of children of marriage with spouse.
17. Names of prior spouses and date of divorce or death of prior spouse.
18. Names and ages and addresses of children of prior marriages.
19. Names of aunts, uncles, and first cousins.
20. If testator was in the military service, indicate date and place of enlistment and discharge, branch of service, highest rank attained, and serial number.
21. If any of the testator's children are minors, indicate whom the testator wishes to be guardian of his or her person, if there is a need for a guardian. (The spouse may indicate a different person than the testator wishes to appoint.)
22. If any of the testator's children are minors, indicate whom the testator wishes to appoint as guardian of his or her property if there is a need for a guardian. (The spouse may indicate a different person than the testator wishes to appoint.)
23. Designate alternative guardians if originally named guardian is unwilling or unable to serve as guardian.
24. Designate personal representative (executor) to gather assets, pay bills, and distribute property in accordance with the will.
25. Designate first and second choice of alternate personal representative if originally named personal representative is unable or unwilling to serve as personal representative.
26. Does testator wish to notify personal representative of appointment as personal representative in will?
27. Does testator wish to leave the entire estate to one person? If so, to whom? Include full name and address unless described above.

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28. Who is to inherit if the primary beneficiary predeceases the testator? (Who are the alternative takes?)
29. Are there any specific monetary bequests? If so, how much and to whom? Is the amount indicated to be free and clear of expenses and taxes or should that person pay some portion of taxes and expenses?
30. Who is to receive the specific monetary bequests if the previously indicate beneficiaries predecease the testator?
31. Are there any specific bequests of personal or real property? Who is to receive the personal or real property if the indicated beneficiaries predecease the testator?
32. Have funeral and burial arrangements been made? If so, where?
33. Any special requests as to funeral and burial arrangements? Modest, expensive, in accordance with religious and/or fraternal or military ceremonies?
34. Provide a no-contest clause? (Anyone contesting the will gets nothing.)
35. Any anticipated special problems?
36. Any special requests in the will? (Simple wills do not contain trust provisions.)
37. List all real estate owned along with a description of how title is held and original cost and current value.
38. List all life insurance policies with numbers and amounts of insurance and beneficiary provisions.
39. List all pensions and retirement plans along with beneficiary provisions.
40. List all stocks and bonds and other securities along with description of how title is held and cost and current value.

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41. List all savings and checking accounts and how title is held and approximate balances.
42. List valuable personal property such as jewelry and collections and location and approximate value.
43. Was any of the property of either spouse inherited? If so, give details.
44. Does either spouse expect to inherit property in the future? Should that property be treated any differently?
45. List all medical insurance coverage.
46. Does testator wish to take possession of original will or to leave it with the firm to prevent accidental or intentional loss or destruction?