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Will Questionnaire

Recommended Estate documents:(circle applicable):

Do you also want a Power of Attorney	Yes	No
Do you also want a Representation Agreement/Living Will	Yes	No

Contact Information: (Name, Aka, home address, email, date of birth, place of birth, occupation)

Marital Status: _____

Name of Spouse: _____

Date of Birth: _____

Place of Birth: _____

Children:

Name of children from this relationship: _____

Name of children from previous relationships: _____

Beneficiaries:(List who you wish to inherit your estate example spouse and if spouse should predecease you to children in equal shares)

Executors:(List who you wish to be your Executor, person who will be in charge of administering your estate as set out in your Will)

Alternative
Executor:

Guardian:(List who you wish to be your Guardian for your minor child(ren))

Alternative
Guardian:

Assets and Liabilities:

Assets:

Real Estate: _____

Business: _____

Investments: _____

Insurance: _____

Other: _____

Liabilities:

Mortgages: _____

Any other money owed: _____

Other: _____

Funeral Arrangements: _____

Location of Will: _____

Other: (Type in further information we should know about your Will, charities, gifts to certain beneficiaries, dependent children):

Power of Attorney and Representation Agreement: (If applicable):

Name and address of Attorney for Power of Attorney:

Power of Attorney to have effect immediately or on loss of mental capacity? (circle applicable)

Immediately LMC

Name and Address of agent for Representation Agreement:

