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WILL QUESTIONNAIRE

Name: _____

Address: _____

_____ Zip: _____

_____ County: _____

Phone: _____

Email: _____

Is this the first time that you are writing a will? _____

Are you married now? _____

Are you U.S. citizen? _____

If married, is spouse a U.S. citizen? _____

Names of children, if any. Include adopted children. Please indicate if any children are under the age of 18 or if any children are deceased. **Please indicate if any children are from a prior relationship or marriage.**

If any of your children have predeceased you, did they have children (your grandchildren) who are to receive property under your will?

Are you a surrogate parent to any child who you have not legally adopted? If yes, please identify that child and state if he or she is to participate in the distribution of your estate:

List all real estate owned. Include shared interests in real estate such as heir property. Add additional pages if necessary.

Do you have a safe deposit box? _____

If yes, where? _____

List all pension and retirement accounts including IRAs but **do not** provide account numbers:

List all types of insurance policies that insure you (and spouse, if married).

Adding up the value of all your assets including cash, bank accounts (personal & joint), stocks, bonds, real estate (less mortgage balances), retirement accounts, jewelry, life insurance policy payouts, to your beneficiaries, business values, vehicles (less payoff balances) etc., is the total value:

Greater than \$100,000.00? _____

Greater than \$500,000.00? _____

Greater than \$1,000,000.00? _____

Greater than \$1,500,000.00? _____

Greater than \$2,000,000.00? _____

Greater than \$3,000,000.00? _____

Please list all jointly owned property and financial accounts but **do not** provide account numbers:

Do any of your intended beneficiaries have special medical care or social service needs?

Do you wish to make specific bequests? This is where you identify a named person to receive specific personal or real property. For example, "I give my gold pocket watch to my nephew Andrew Williams." is a specific bequest. If you wish to make any specific bequests, please name the items and the persons who are to receive them.

Do you wish to make any general bequests? A general bequest is typically a gift of cash. For example, "I give \$1,000.00 to my friend George Washington." is a general bequest.

Everything that you own which is not specifically identified and designated to a named person shall be placed into what is referred to as your "**residuary estate.**" It is standard will practice to name one or more persons (or charities) to share in your residuary estate. The sharing of your residuary estate does not have to be equal. You could say: "I give 75 percent of my residuary estate to my daughter Amy Johnson and 25 percent of my estate to my sister Sally Smith. Which people or charities are to receive your residuary estate? Please indicate if there is to be an unequal sharing of your residuary estate.

When a will is submitted to the court for probate, someone who you trust has to be named as **Personal Representative**. The Personal Representative's responsibility is to take control of all your property (your assets) and to distribute that property according to your wishes. It is permissible to have more than one Personal Representative. Personal Representatives are allowed compensation for their efforts and routinely apply for it. Such compensation may be as high as 3% of your estate. **Who do you designate as your Personal Representative(s)? You also may name an alternate Personal Representative and/or Co-Personal Representatives (more than one)** . Personal Representatives cannot have a felony conviction in their past. Additionally, only people related by blood can become personal representatives if they are not Florida residents.

Sometimes you intend for a bequest to go to an adult, but the named adult dies before receiving the bequest (or they refuse the inheritance). In certain situations involving closely related people, the property intended for the deceased person ends up going to his or her heirs. Occasionally, such an unintended distribution ends up going to a minor or young person not mature enough to handle large sums of money and/or property having high value such as real estate. Do you desire in those just described situations to have high value property held in a trust that is controlled by a trustee for the benefit of the person not mature enough to handle high value property? If you do, please identify the person to be the trustee.

Are you the named beneficiary of another person's trust?

Have you previously placed any of your property in a revocable or irrevocable trust?

Have you given to your children or other close family members any valuable assets such as real estate? _____. If yes, describe: _____

Do you wish to have specific burial instructions included in your will? If yes, describe:

If you have children under the age of 18, who do you wish to appoint as guardian if you die before your child or children are of legal age? What is their relationship to you?

If you would like a **Designation of a Health Care Surrogate**, please identify the person who you authorize to make health care decisions for you if you are unable:

Name: _____

Address: _____

Phone #: _____

Alternate Health Care Surrogate (Optional)

Name: _____

Address: _____

Phone #: _____

If you would like a **Durable Power of Attorney**, please identify the person who you authorize to act on your behalf in financial matters if you are unable:

Name: _____

Address: _____

Phone #: _____

Alternate Power of Attorney Agent (Optional)

Name: _____

Address: _____

Phone #: _____

Notes:

