

**WILL DRAFTING QUESTIONNAIRE
CLIENT DATA**

Client's SSN:

File No.:

Date:

Interviewer:

1. Client's Name:

2. Also known as:

3. Address:

Telephone:

4. Date of Birth:

Place of Birth:

5. Business Address:

Telephone:

6. Length of Residency in this State:

7. Prior Wills or Codicils:

Where located:

PRESENT SPOUSE

8. Name:

9. Also known as:

10. Do you live together: yes_____ no_____

11. When were you married:

12. Where were you married:

PRIOR MARRIAGES

13. Name of Spouse

How terminated

Date terminated

CHILDREN

14. Children of Present Marriage:

<u>Name</u>	<u>Sex</u>	<u>DOB</u>	<u>Address</u>	<u>Married</u>
-------------	------------	------------	----------------	----------------

15. Children of Prior Marriages:

<u>Name</u>	<u>Sex</u>	<u>DOB</u>	<u>Address</u>	<u>Married</u>
-------------	------------	------------	----------------	----------------

16. Adopted Children:

<u>Name</u>	<u>Sex</u>	<u>DOB</u>	<u>Address</u>	<u>Married</u>
-------------	------------	------------	----------------	----------------

17. Stepchildren:

<u>Name</u>	<u>Sex</u>	<u>DOB</u>	<u>Address</u>	<u>Married</u>
-------------	------------	------------	----------------	----------------

PROPERTY

18. **Real Estate:**
Location:
General Description:
Type of Ownership:
Mortgages:
Estimated Value:

19. **Stocks, Bonds and Securities:**

Type of Ownership:
Market Value:

20. <u>Bank Accounts</u>	<u>How Registered</u> (joint, survivorship, trust, custodial)	<u>Amount</u>
---------------------------------	--	----------------------

21. **Business Affiliations or Interests:**

Nature:

Address:

Type (Corp., Partnership, Sole Proprietorship):

Interest:

22. **Pensions, retirement, death benefits and insurance policies:**

Type

Beneficiary

23. Other Assets or Investments:

DISPOSITION OF ESTATE

24. If you are married, do you wish everything to go to your spouse if she/he survives you:

yes _____ no _____

25. If you do not have a spouse but you have children, do you wish everything to go to your children in equal shares:

yes _____ no _____

NOTE: If you answered yes to questions 24 or 25, you do not need to answer questions 26 and 27 unless you wish to make specific gifts to an individual eg. "I give \$1,000 to John Smith".

26. Do you wish to make a specific bequest of real property:

A) Name of beneficiary Relationship Address of property

B) Do you wish to make a specific bequest of personal property eg. "I give my diamond ring to Jill Smith":

Name of beneficiary Relationship Description of property

C) Do you wish to make a specific gift of cash eg. "\$1,000 to my son, John Smith":

<u>Name of beneficiary</u>	<u>Relationship</u>	<u>Amount</u>
----------------------------	---------------------	---------------

27. If you answered "no" to questions 24 or 25, who do you wish to give the residue of your estate to?
(residue means everything that is left after you have made specific gifts):

FIDUCIARIES

28. Executor(s):

Name:

Relationship:

Address:

29. Alternate Executor:

Name:

Relationship:

Address: