

WILL QUESTIONNAIRE

PLEASE BRING TO THE FIRST CONSULTATION AS MANY OF THE FOLLOWING DOCUMENTS AS ARE APPLICABLE TO YOU (check those which apply):

- Existing Wills or Trust Agreements;
- Life Insurance policies;
- Divorce Decrees and Property Settlement Agreements;
- Deeds and Lease Agreements for Real Estate;
- Employee Benefit and Retirement Plans;
- Corporation Documents and Shareholder Agreements;
- Partnership Agreements;
- Deeds of Trust and Notes for Money **Owed to You**
- Last Year's Income Tax Return
- Gift Tax Returns
- Any Other Information That Might Be Important

Your Name

S.S.N.

Telephone

Date of Birth

If Married, Name of Spouse

S.S.N.

Spouse's Date of Birth

Mailing Address

City or County of Residence

Names and ages of all children. Please list all children, whether now living or deceased, and indicate whether any are adopted or are children from a prior marriage, etc.

Name

Date of Birth

Child's Spouse

Do they have any minor children? Yes No

Name

Date of Birth

Child's Spouse

Do they have any minor children? Yes No

Name

Date of Birth

Child's Spouse

Do they have any minor children? Yes No

(Continue with additional names on reverse side.)

1. Do you have any previous marriages? Yes No

If your answer was yes, please complete the following:

Former Spouse: _____

Date & Place of Marriage: _____

How terminated: _____

Date of Termination: _____

2. Are you obligated to make support payments? Yes No

3. Are there special needs for any child? Yes No

4. Do you have a Standby Guardianship Designation in place? Yes No

5. Do you have any pets you wish to provide for? Yes No

6. Military Service? Yes No

7. Specific instructions for burial? (Note, since the will is usually not seen until after burial, this may not be binding) Yes No

8. Do you own any real estate or personal property located outside Virginia? Yes No

9. If married, have you during this marriage lived in Arizona, California, Idaho, Louisiana, New Mexico, Nevada, Texas, Washington, or Wisconsin? Yes No

10. Do you have any trusts for yourself or other family members? Yes No

11. Are you a party to any Buy-Sell Agreement, Stock Purchase Agreement or partnership? Yes No

If so, please bring a copy of the trust or other document to our appointment.

12. Please indicate approximate size of the estate (including life insurance, real estate, retirement plans, and all other assets). \$ _____

13. Please provide a summary of your assets on the attached sheets A and B. Indicate how property is owned (your name, spouse's name, or joint names), include cash value and face value of life insurance and beneficiary, and value of all assets taken into account in answering the question above. You may substitute a recent financial statement for sheets A and B. If you have questions about any of your assets, such as the form of ownership or beneficiary designation, please bring in the relevant paperwork to your appointment.

SHEET "A"

Asset Summary

	HUSBAND	WIFE	JOINT
LIFE INSURANCE			
RESIDENCE			
OTHER REAL PROPERTY			
BANK ACCOUNTS			
MARKETABLE SECURITIES			
TANGIBLE PERSONAL PROPERTY			
OTHER SUBSTANTIAL ASSETS (I.E. RETIREMENT ACCOUNTS, BUSINESS INTERESTS, ETC.)			
TOTAL:	\$	\$	\$
LESS DEBTS:			
ESTIMATED NET ESTATE:	\$	\$	\$

NOTES:

