

WILL PREPARATION – FACTUAL INFORMATION

(Where space is found insufficient, use blank sheet and refer to question number)

File No. _____

Date of Interview _____

Person(s) Present _____

Time: _____ to _____

Interviewed by _____

CLIENT

1. Client’s full name _____ S.S. # _____

2. Variances in spelling _____ Birth date _____

3. Other names used _____

4. Home address _____

County _____ State _____ Zip _____

5. Telephone: Home _____ Business _____

6. Citizenship _____ How long resident in this State _____

7. Any existing wills _____ Where located _____

SPOUSE

8. Spouse’s full name _____ S.S. # _____

9. Variances in spelling _____ Birth date _____

10. Other names used _____

11. Citizenship _____ How long resident in this State _____

12. Residence if different _____ Telephone _____

13. Any existing wills _____ Where located _____

MARRIAGE(S)

14. Date and place of present marriage _____

15. Prior marriage(s): date, how and when terminated _____

CHILDREN & GRANDCHILDREN

16. Children of present marriage: Name, sex, age, residence and marital status _____

17. Adopted children: Name, sex, age, residence, date of adoption and marital status _____

24. Real Estate: Location and general description – record owners – how and when acquired – estimated value - mortgages

25. Insurance policies, pensions, retirement and death benefits: (Identification and beneficiary) _____

26. Business affiliations and interests: (details) _____

27. Expectancies: inheritances, gifts _____

28. Personal effects: including furs, jewelry, art, cash on hand and other items of substantial value _____

29. Bank and Savings & Loan Association Accounts: Savings – Time Cert. – Checking – other. How registered (Joint, Survivorship, Trust, Custodial). _____

30. Safe deposit box: location and how registered _____

31. Other investments: nature and in what name(s) held _____

35. Residuary Estate – Contingencies over (exoneration of mortgages) _____

36. Disposition of loans or advances made or to be made _____

37. Exercise of powers of appointment or disposition _____

38. Provisions regarding gifts or bequests to minors or incompetents _____

39. Charitable bequests _____

40. Payment of inheritance – estate – death taxes _____

41. Funeral, burial, monument, services, grave care, etc. _____

FIDUCIARIES

42. Executor(s) and Alternate(s):
 Name _____ Relationship _____ Age _____
 Address _____
 Name _____ Relationship _____ Age _____
 Address _____
43. Trustee(s) and Alternate(s):
 Name _____ Relationship _____ Age _____
 Address _____
 Name _____ Relationship _____ Age _____
 Address _____
44. Guardian and alternate(s) of minor children or incompetents:

Name _____ Relationship _____ Age _____

Address _____

Name _____ Relationship _____ Age _____

Address _____

ADDITIONAL INFORMATION

_____ Fee Quoted \$ _____