

CONFIDENTIAL WILL QUESTIONNAIRE

PLEASE READ THESE INSTRUCTIONS BEFORE YOU COMPLETE THE QUESTIONNAIRE

THIS WILL QUESTIONNAIRE IS FURNISHED FOR YOU USE TO PROVIDE INFORMATION THAT WILL ENABLE L. THEODORE HOPPE, JR., ESQUIRE – ATTORNEY AT LAW TO PREPARE YOUR WILL. ***THIS QUESTIONNAIRE IS NOT A LAST WILL AND TESTAMENT.***

1) A Will ensures that your personal belongings or other assets are distributed according your wishes upon your death. If you have assets in excess of the Internal Revenue Service Tax Code limitations, you should inquire about further Estate Planning, due to the estate taxes that may be levied in the US.

2) Complete each question by providing the requested information. Please feel free to attach additional pages if necessary. Be sure to note the number of the question that is being responded to.

3) Please type or print your answers to the questions.

4) Please take time to verify the correct spelling of all names and places.

5) Please be sure to provide your net worth where requested. This will help us to determine if you might benefit from additional estate planning.

6) If you have any questions while filling out the form, please contact us at 610-497-3579 or thoppe@thoppelaw.com.

D) Personal Information

Name: _____
First Middle Last

Street Address: _____

City: _____ State: _____ Zip Code: _____

Phone number: _____

Email address: _____

Date of birth: _____

Married: _____ If so, No. of times _____ Single _____ Divorced _____ Widow(er) _____

Spouse:

Name: _____
First Middle Last

Natural and Adopted Children:

Please provide full name (First, middle, last) and Date of Birth. Please note if any child is deceased.

	First	Middle	Last	DOB
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____
6.	_____	_____	_____	_____

Special Note Regarding Children: _____

Stepchildren:

Please provide full name (First, middle, last) and Date of Birth. If you do not want a stepchild included in your will, please note this.

	First	Middle	Last	DOB
1.	_____			
2.	_____			
3.	_____			
4.	_____			

II) Executors, Trustees, and Guardians

- 1) Executor** – The Executor is the person who is going to administer your Estate. A minor cannot administer your Estate. While someone who lives out of state can be your Executor, they may have difficulty due to the distance. If you are married, you may want to select your spouse. You can name co-executors, but it is important that they be able to work together.

First	Middle	Last
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Address

Relationship to you

Successor Executor (If Primary Executor cannot serve)

First

Middle

Last

Address

Relationship to you

- 2) *Trustee* – In the event that a bequest will go to a minor child, you may want to consider establishing a Trust for the child. In that case, you will need to name a Trustee to care for the money. Note: The same person can be the Executor, Trustee and Guardian, but we recommend that the Trustee and Guardian be different to maintain accountability.

First

Middle

Last

Address

Relationship to you

Successor Trustee (If Primary Trustee cannot serve)

First

Middle

Last

Address

Relationship to you

- 3) **Guardian** – If you have minor children, you may select a guardian to care for your children after your death. Some things to remember: 1) It is presumed that the surviving parent will get custody and 2) the appointment of a guardian in your Will does not override a custody Order.

First Middle Last

Address

Relationship to you

Successor Guardian (If Primary Guardian cannot serve)

First Middle Last

Address

Relationship to you

III) **Bequests**

a) **Specific Bequests:**

If you would like to make any specific gifts in your Will, please not them here. Please be as specific as possible in identifying the item that is being gifted. You cannot give away an interest that you may have in a joint tenancy, insurance policies or retirement accounts, unless the beneficiary is yourself and your Estate.

1. Gift: _____

Beneficiary: _____

Relationship to you: _____

2. Gift: _____

Beneficiary: _____

Relationship to you: _____

3. Gift: _____

Beneficiary: _____

Relationship to you: _____

b) General Bequests - The following are several common options for bequests. Please check the option that you prefer. You can also note any other plan for distribution of your Estate.

1. Situation – Spouse and Children _____

I want to leave all my property to my spouse and, if my spouse dies before me, then to my surviving children equally. If any of my children dies before me, I want the deceased child's share to go to (select one):

_____ My surviving children equally

_____ The deceased child's living children (your grandchildren) equally

2. Situation – Spouse and No Children _____

I do not have children and I want to leave all my property to my spouse. If my spouse does not survive me, then to the following persons or organizations. If you name an organization, please provide the full name and address for the organization:

	Full name	Relationship to Me	Percentage or amount
1)	_____		
2)	_____		
3)	_____		

3. Situation – Children and No Spouse _____

I do not have a spouse and I want my property divided equally between my surviving children. If any of my children dies before me, I want the deceased child’s share to go to (select one):

_____ My surviving children equally

_____ The deceased child’s living children (my grandchildren) equally

4. No Spouse and No Children _____

I do not have a spouse or living children. I want to leave all my property to one or more of the following persons or organizations. If you name an organization, please provide the full name and address for the organization:

	Full name	Relationship to Me	Percentage or amount
1)	_____		
2)	_____		
3)	_____		

c) **Alternate Beneficiaries:** In the event none of your named beneficiaries survive you, you may want to name an alternate beneficiary(ies). If you name an organization, please provide the full name and address for the organization:

	Full name	Relationship to Me	Percentage or amount
1)	_____		
2)	_____		
3)	_____		

d) *Minor children*

If any beneficiary of mine is a minor the age that I want the minor children to receive money held in Trust for them is:

Age 18 _____ Age 21 _____ Age 25 _____ Age 30 _____ Other Age _____

IV) *Other Information to Consider*

If the answer to any of the following questions is yes, you may want to consider setting up an appointment to discuss how this might affect your estate and additional estate planning options.

- 1) Do you own any interest in a business? Yes _____ No _____
- 2) Have you been married more than once? Yes _____ No _____
- 3) Do you own any real property other than your home? Yes _____ No _____
- 4) Do any of your children have special needs? Yes _____ No _____

V) *Asset and Liability Summary*

The total value of all of my real estate, bank accounts, (checking and savings), securities (stocks, bonds, partnership interests, sole proprietorships, promissory notes held by me, etc.), life insurance policies (face value and cash value if any), other policies (face value and cash value if any), and any other property owned by me and my spouse (if married) minus all mortgages, promissory notes, and any other liabilities =

\$ _____.

If this amount exceeds the current years IRS tax code limitations, then you may need further estate planning.

Date

Signature