WILL QUESTIONNAIRE

PART I: BACKGROUND INFORMATION

1. What is your full legal name, including any middle name?

   _____

2. Are you known by any nicknames? If so, what are they?

   _____

3. Mailing Address: _____

   _____Email:_____

4. Telephone: Home #: _____ Work #: _____

5. Date of Birth: _____

6. Place of Birth: _____

7. Are you single? _____ Married? _____ Divorced? _____

   Widowed? _____ Separated? _____

8. If you have ever been married, please list the names of your spouses, the date of your marriages, whether or not you're still married to that person, and if you're no longer married to that person, how the marriage ended (divorce, death, etc.) and when it ended:

Name of Spouse	Date of Marriage	Still Married	How Ended	When Ended
(a)				
(b)				
(c)				

(d) _____

9. If you are separated from your spouse, what is the name of your spouse and when did you become separated?

_____

10. List the names of every person you now support within your household, if there are any, and what relationship they are to you:

Name	Relationship
(a) _____	
(b) _____	
(c) _____	
(d) _____	
(e) _____	
(f) _____	
(g) _____	
(h) _____	

11. If you pay support for someone outside of your home, give that person's name, the amount you pay, and whether there is a legal obligation for you to support that person:

Name	Amount paid	Legal Obligation
(a) _____		
(b) _____		
(c) _____		
(d) _____		

12. List the names of all your living children, including those by prior marriage, those you adopted, and if they are step-children:

Name	Address	Date of Birth	Natural or Adopted	Single Divorced Married etc.
(a)				
(b)				
(c)				
(d)				
(e)				
(f)				
(g)				
(h)				

13. List the names of all your deceased children, including those by prior marriage, adopted and step-children:

Name:	Natural, Step Adopted	Single, Married Divorced etc.	Date of Death
(a)			
(b)			
(c)			
(d)			

14. If any of your deceased children has left children who are now living, list the names of those children (your grandchildren) and indicate who their parent is:

Name of Surviving Grandchild	Name of Grandchild's deceased parent	Address

(a) _____

(b) _____

(c) _____

(d) _____

15. List the names of any grandchildren and great-grandchildren that you wish to give a portion of your property to:

Name	Address	Name of Parent

(a) _____

(b) _____

(c) _____

(d) _____

(e) _____

(f) _____

(g) _____

(h) _____

16. List the names of your parents, brothers and sisters:

Name	Date of Birth	Address	Alive or Date of Death

Father: _____

Mother: _____

Brothers & Sisters: _____

_____

_____

_____

17. If you are married, give the names of your current spouse's parents and brothers and sisters:

Name	Date of Birth	Address	Alive or Date of Death

Father: _____

Mother: _____

Brothers & Sisters: _____

_____

_____

_____

18. If you and your current spouse or partner have contacted this firm to execute wills, and you seek joint representation, are you willing to waive your right to keep secrets from your spouse regarding your will during the drafting process?

Initials_____ Initials_____

19. If you and your spouse or partner seek joint representation do you consent to this firm representing both of you, having waived confidentiality,

and with the understanding that a conflict of interest could arise requiring this firm to withdraw from representation?

Initials_____ Initials_____

PART II: PROPERTY DISTRIBUTION

20. Do you have any bank accounts, including checking, savings or credit union accounts? If so, what bank are they in and where is that bank located?

Kind of Account	Name of Bank	City or Address

(a) _____

(b) _____

(c) _____

(d) _____

Whose name is each account in? _____

_____

What are the account numbers? _____

_____

List the names of the people who you want to receive the money in these accounts when you pass away:

_____

_____

_____

List the names of the people who would be your second choices:

_____

_____

_____

21. Do you own any stock, bonds, mutual funds, notes, or mortgages, including Alaska Native Claims Settlement Act (ANCSA) stock?

Retirement / investment accounts: _____Type: (e.g., Roth IRA, Traditional IRA, 401-K, PERS, TRS, or other defined benefit pension plan, taxable brokerage account)

_____

If so, please contact your broker / administrator and have him fax a copy of your beneficiary designations for each account and attach to this questionnaire. Be sure to review these designations yourself from time to time to make sure they accurately reflect your testamentary (will) intentions.

Plan Administrator Contact info:_____

_____

Broker Contact info:_____

_____

Approximate value of all accounts:_____

If you own ANCSA stock, what regional corporation and what village corporation are you a shareholder?

Regional: _____ Village: _____

How many shares of stock do you own in each corporation?

Regional: _____ Village: _____

List the names of the people that you want to inherit these investment / retirement accounts / stocks / mutual funds, etc. to:

Name: Name of Stock: Number of Shares: Current POD beneficiary:

_____

_____

_____

_____

Who would be your second choices?

Name: Name of Stock: Number of Shares: Alternate POD ben:

_____

_____

_____

_____

22. Do you own your own house? Do you own more than one home? Do you own any land? If the answer to any of these questions is "yes", give a description of where the land is by tract, lot and block numbers as well as through street address and city or village.

_____

_____

_____

_____

_____

In whose name is the house and land? _____

Who do you want to will your land and home to? _____

_____

Who is your second choice? _____

_____

23. Do you have any life insurance? If so, in what company:

_____Agent Telephone #: _____

What type of life insurance? (Whole Life / Universal / Term)_____

Who is listed as the POD beneficiary under the terms of this policy?

_____ Alternate Beneficiary?_____

Is that who you want to give this insurance money to? _____

Who is your second choice? _____

24. Do you own any boats, skiffs, outboards, fishing gear? If so, please describe:

_____

_____

_____

Who do you want to give them to?

_____

_____

_____

25. Do you own a limited entry permit? _____

Who do you want to given it to? _____

Who is your second choice? _____

26. Do you own any cars, trucks, three wheelers, snowmobiles, etc.? If so, please describe them:

_____

_____

_____

_____

Who do you want to give them to?

_____

_____

Who is your second choice?

_____

_____

27. Do you own any rifles or any other guns? If so please describe them:

_____

_____

Who do you want to give them to?

_____

Who is your second choice?

_____

28. Do you have any television sets, VCRs, CD/Stereo players? If so, describe them:

_____

_____

_____

Who do you want to give them to?

_____

Who is your second choice?

_____

29. Do you own any other property of value or special nature such as jewelry, family heirlooms, antiques or paintings? If so, describe them:

_____

_____

_____

_____

_____

_____

_____

_____

Who do you want to give them to?

_____

_____

_____

_____

Who is your second choice?

_____

_____

_____

_____

30. The “residue” clause covers anything that you have forgotten to mention or anything you acquire in the future. Who do you want to give your residue to?

_____

_____

Who is your second choice?

_____

_____

31. Please list / identify any other types of property / debts do you own / owe e.g.:

-Limited Liability Company Interests
-Corporate Business and Professional Interests
-Partnership Interests
-Sole Proprietorship Business and Professional Interests
-Real Property
-Personal Effects
-Anticipated Inheritance, Gifts, or Lawsuit Judgments
-Cash Accounts
-Mortgages, Notes and Other Receivables Owed to the Client
-Investment Accounts
-Stocks
-Alaska Native Stock
-Retirement Plans
-Bonds
-Farm and Ranch Interests
-Oil, Gas, and Mineral Interests
-Fishing Interests
-Other Assets
-Liabilities
-Unpaid Taxes
-Real Estate Mortgages
-Loans Against Life Insurance

PART III: MISCELLANEOUS INFORMATION

32. Do you or anyone of the persons that you have listed as potential heirs have a physical, mental or emotional disability? If so, please describe:

_____

_____

_____

33. Who would you like to choose as the personal representative (or executor) of your estate? The personal representative is the person who is responsible for taking care of your property after you die, and seeing that

everything is distributed properly. The personal representative may be a spouse, family member, friend, or institution.

Name Mailing Address Relationship

_____

Who is your second choice?

Name Mailing Address Relationship

_____

34. If you have minor children at the time of your death, and your spouse has already passed away, you should name a "legal guardian" to take care and raise your children.

Name Mailing Address Relationship

_____

Who is your second choice?

Name Mailing Address Relationship

_____

35. If a trust is to be set up in your will, describe this trust (for whom, amount, and for how long):

_____

_____

_____

_____

Who would you like to be the "trustee"?

Name Mailing Address Relationship

_____

Who is your second choice?

Name Mailing Address Relationship

_____

36. What burial or funeral arrangement would you like to have?

_____

_____

_____

_____

37. Have you ever made a will before? If so, when did you complete that will?

_____

If you have a copy of this will, please attach it to this questionnaire.

38. Do you have a pre or post-nuptial agreement? _____If so, please attach to this form for review.

39. Please provide an estimate of your net worth by adding up all of your valuable assets (including the equity in your home) and subtracting all of your debt / liabilities.

Total of Assets:_____

Total of Debts:_____

Net Worth:_____

Estimated Net Worth at Death:_____

Likely Life Insurance Policy payable at death: _____*

* Please understand that a simple may not be the appropriate estate planning tool for you if your estimated net worth upon death when added to any likely life insurance policy exceeds 1 million dollars. Estate tax law is constantly changing, so this advisory may well be out of date by the time you read it. **The estate tax exemption amount for 2026 is $15,000,000** per person. This means that you will not incur estate tax liability if your net worth upon death, or upon liquidation of the estate assets (including life insurance benefits) is less than the exemption amount.

For more information consult your tax advisor, and or a lawyer specializing in estate planning. General information can be found on the IRS website and at the following link:

https://www.irs.gov/businesses/small-businesses-self-employed/estate-tax

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