

Law office of  
**CHRISTOPHER J. NEARY**

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WILL QUESTIONAIRE

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PLEASE PRINT CLEARLY SO CORRECT SPELLING IS CLEAR.

NAME: \_\_\_\_\_  
DATE: \_\_\_\_\_

PRINT FULL NAME: \_\_\_\_\_

PRINT NAME AS YOU SIGN YOUR CHECKS: \_\_\_\_\_

Street Address: \_\_\_\_\_  
\_\_\_\_\_

~~~~~  
Mailing Address: \_\_\_\_\_  
\_\_\_\_\_

Home Phone: (\_\_\_\_) \_\_\_\_\_ Work Phone: (\_\_\_\_) \_\_\_\_\_

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Have you been known by any other names? Please include maiden names, nicknames, etc. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Are you currently married? \_\_\_\_\_ If so, state date of marriage and full name of spouse. \_\_\_\_\_  
\_\_\_\_\_

Do you have any former marriages? \_\_\_\_\_ If yes, please list name(s) of former spouse(s), dates of marriage, and how marriage was terminated, ie death, divorce:

| _____                 | _____ to _____    | _____          |
|-----------------------|-------------------|----------------|
| Name of former spouse | Dates of marriage | How terminated |

For each natural child list the following:

| _____ | _____ | _____ |
|-------|-------|-------|
| NAME  | AGE   |       |

|               |              |                          |
|---------------|--------------|--------------------------|
|               |              | CURRENT ADDRESS          |
| _____<br>NAME | _____<br>AGE | _____<br>CURRENT ADDRESS |
| _____<br>NAME | _____<br>AGE | _____<br>CURRENT ADDRESS |
| _____<br>NAME | _____<br>AGE | _____<br>CURRENT ADDRESS |
| _____<br>NAME | _____<br>AGE | _____<br>CURRENT ADDRESS |

[ ] Check box and use back of this sheet if additional room is needed.

DO YOU HAVE ANY PREDECEASED CHILDREN? \_\_\_\_\_ If so, did predeceased child have any children? \_\_\_\_\_

HAVE YOU LEGALLY ADOPTED ANY PERSON? \_\_\_\_\_

DO YOU HAVE ANY STEP-CHILDREN?

|               |              |                                       |
|---------------|--------------|---------------------------------------|
| _____<br>NAME | _____<br>AGE | _____<br>SPOUSE WHO IS NATURAL PARENT |
| _____<br>NAME | _____<br>AGE | _____<br>SPOUSE WHO IS NATURAL PARENT |
| _____<br>NAME | _____<br>AGE | _____<br>SPOUSE WHO IS NATURAL PARENT |
| _____<br>NAME | _____<br>AGE | _____<br>SPOUSE WHO IS NATURAL PARENT |

Do you have a safe deposit box? [ ] YES [ ] NO  
If so, where? \_\_\_\_\_

Do you have an existing will? [ ] YES [ ] NO

If so, state date or approximate date of existing will. \_\_\_\_\_

Is your net worth less than \$600,000.? [ ] YES [ ] NO

*(If your net worth is less than \$600,000. we do not have to consider death taxes which are also called inheritance taxes.)*

If your net worth is less than \$600,000., is it likely to increase to or exceed \$600,000.? [ ] [ ]

Name of Taxpreparer:  YES  NO \_\_\_\_\_

Who do you propose as the Executor of your will. *(Ordinarily, this would be your spouse or other person who would be able to manage your affairs while your estate is being probated.)*

First choice: \_\_\_\_\_

Second choice: \_\_\_\_\_

Do you want your Executor to be required to post a bond?  [ ]  [ ]  
YES NO

Do you want your Executor to have full powers or are there any limitations you would like to place on your Executor?  [ ]  [ ]  
\_\_\_\_\_  
YES NO

Do you want to discuss a durable power of attorney which would permit a trusted person to manage your affairs should you become disabled?  [ ]  [ ]  
YES NO \_\_\_\_\_

Do you have a power of attorney for health care?  [ ]  [ ]  
YES NO

If not do you wish to discuss it?  [ ]  [ ]  
YES NO

Have you made any funeral arrangements for yourself in advance?  
 [ ]  [ ]  
YES NO

Describe or state preference if you wish to state it in your will:

List any specific bequests: \_\_\_\_\_

Residuary beneficiary(ies):