

Law office of
NEARY and O'BRIEN

WILL QUESTIONNAIRE

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 _____

_____	_____	_____
NAME	AGE	CURRENT ADDRESS
_____	_____	_____
NAME	AGE	CURRENT ADDRESS
_____	_____	_____
NAME	AGE	CURRENT ADDRESS
_____	_____	_____
NAME	AGE	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?

_____	_____	_____
NAME	AGE	SPOUSE WHO IS NATURAL PARENT
_____	_____	_____
NAME	AGE	SPOUSE WHO IS NATURAL PARENT
_____	_____	_____
NAME	AGE	SPOUSE WHO IS NATURAL PARENT
_____	_____	_____
NAME	AGE	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.? [] []

YES NO

Name of Taxpreparer: _____

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):