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WILL QUESTIONNAIRE

Date: _____

Please complete this questionnaire as completely and accurately as you can. This form is extremely important. All sections and information must be filled out prior to meeting with the attorney. Please be sure to check all appropriate boxes. PLEASE PRINT CLEARLY.

1. Personal Information:

- a. Name: _____
- b. Date of Birth: _____
- c. Social Security Number: _____
- d. Address: _____
- e. City, State, Zip: _____
- f. E-mail address: _____
- g. Marital Status: [] Single [] Married [] Separated [] Divorced [] Widowed

2. Telephone numbers

- a. Home: () -
- b. Cell: () -
- c. Work: () - ext
- d. Which number do you prefer that we contact you? _____

IF MARRIED OR SEPARATED, please complete information below:

Name of Spouse: _____

Date of Birth: _____

Social Security Number: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone Number: _____

If you are the parent or legal guardian of a minor child or children, please check here []
We recommend a Medical Directive and Power of Attorney in the event of your physical or mental disability to help you with your financial affairs. [] Yes [] No

We recommend a Living Will telling hospitals and doctors not to prolong your life by artificial means, i.e. Terri Schiavo; Karen Quinlan. [] Yes [] No

ESTATE EXECUTOR

The person charged with administering/Probating your estate, paying taxes and/or other debts, preserving, managing, and distributing estate assets and property is called an Executor. This person should be one in whom you have trust and confidence. Your SPOUSE is usually named as primary Executor, followed by the child who lives closest to your home.

Please provide the following information about the person you wish to name to serve in this capacity.

1. PRIMARY Choice of Executor/Personal Representative:

Name: _____

Relationship: _____

Address: _____

2. SECOND Choice of Executor:

This person will serve in the event the primary executor/personal representative is not alive at the time of your death, or is unable to serve.

Full Name: _____

Relationship: _____

Address: _____

The two proposed Executors must be filled out prior to meeting the attorney. We do not recommend Joint Executors, which often cause conflicts and additional work for the Estate. It is best to select one primary person, then a secondary person.

ASSET INFORMATION- Must be completed- If none, write "none"

House/Real Estate Address

Estimate Total Real Estate Value: _____ Approx Mortgage: _____

Bank Accounts, Stocks, CDs and Assets:

Approximate Amount _____

Beneficiaries of Bank Accounts- if none, write "none" _____

Other Major Assets- if none, write "none" _____

Approximate Life Insurance: _____ Beneficiary: _____

In the Will, who do you want to get your assets?

Beneficiary (1) _____ Relationship _____

Beneficiary (2) _____ Relationship _____

Beneficiary (3) _____ Relationship _____

It is required by New Jersey Rules that assets and beneficiaries be filled out prior to seeing the attorney.

[] A. MARRIED PERSONS WITH CHILD(REN) OR GRANDCHILD(REN).

Generally most married people provide that, upon their death, property will be distributed as follows:

1. Your estate (all property and assets not owned jointly with another person) will be distributed to your surviving spouse.
2. If your spouse predeceases you, then your estate will be divided in equal shares among all of your living children, if any child shall predeceases you, then that child's share to their children (grandchildren).

Name of Child: _____ Age: _____

Name of Child: _____ Age: _____

Name of Child: _____ Age: _____

LIST THE NAMES AND AGES OF ALL CHILDREN EVEN IF THEY ARE OLDER THAN EIGHTEEN. IF NOT CHILDREN, WRITE NONE.

GUARDIAN(S) OF MINOR CHILD(REN)

[Skip this section if you have NO minor children and DO NOT want a trust. There are substantial additional fees for preparation of a Trust]

The surviving parent of a minor child is ordinarily entitled to be the GUARDIAN of that child. In the case of simultaneous death of you and your spouse, or if you are a single parent, you should appoint a Guardian for your minor child. It is advisable, prior to the completion of this Questionnaire, to make sure that your proposed Guardian(s) is (are) willing to serve as Guardian(s). In addition, the Guardian will also hold the monies for the minor children UNLESS you direct us otherwise. In your Will you can have any adult serve as Trustee of monies for minor children.

Provide the following information about the person(s) you select to be Guardian(s)/Trustee(s). In the event my spouse predeceases me, I name as GUARDIAN(S)/TRUSTEE(S):

1. PRIMARY Choice of GUARDIAN/TRUSTEE:

Name _____ Relationship _____

2. SECOND Choice of GUARDIAN/TRUSTEE:

Name _____ Relationship _____

Are there any beneficiaries with special needs, or receiving SSI or SSD? Please answer in detail.

[] B. MARRIED PERSONS WITH NO CHILD(REN) OR GRANDCHILD(REN).

Generally most married people with no child(ren) or grand(ren) provide that upon their death their property will be distributed as follows:

1. Your estate (all property and assets not owned jointly with another person) will be distributed to your surviving spouse but
2. If your spouse predeceases you, then your estate will be distributed to your living parent, or equally to your living parents.
3. But should both of your parents predecease you, then your estate will be distributed equally to your siblings or equally to the children of a predeceased sibling.

Please check B above only if you wish your property distributed precisely and exactly as indicated in section B, 1 through 3, above.

Additional information on Wills, Probate and Elder Law available at www.njlaws.com

C. DIVORCED OR WIDOWED PERSONS WITH CHILD(REN) OR GRANDCHILD(REN).

Generally most divorced or widowed persons with child(ren) or grandchild(ren) provide that upon their death property will be distributed as follows:

1. Your estate (all property and assets not owned jointly with another person) will be distributed in equal shares to all of your living child(ren).
2. But if one or more of your children predeceases you, that deceased child's share will be distributed to his or her child(ren), your grandchild(ren) in equal shares

D. ALTERNATE PLAN OF DISTRIBUTION- You may list specific gifts to individuals and/or divide your estate among several individuals by listing percentages to each, making sure that the percentages total 100%. You may add additional sheets if necessary or use the back of this form. There are additional Will preparation fees if there are gifts, called specific bequests.

Any specific bequests of money and property:

Have any other questions, comments, or other important information? How can we help you?

Referred by: _____