

TURNER & LAWRENCE, P.C.

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BILL TURNER, ESQ.

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LAST WILL AND TESTAMENT QUESTIONNAIRE

Please write clearly and legibly and bring this with you to your consultation with us. Thank you.

SECTION I:

Full Name

Living Spouse's Full Name (or none)

Your Address:

County

SECTION II:

Do you have a will now?.....	[Y]	[N]
Do you have a living will?	[Y]	[N]
Are you divorced?	[Y]	[N]
Are you a widow/widower?	[Y]	[N]
Do you have life insurance?	[Y]	[N]
Do you own real estate?	[Y]	[N]
Do you have a pension?	[Y]	[N]
Do you have a 401 retirement account?	[Y]	[N]
I have made funeral or burial arrangements.....	[Y]	[N]

SECTION III:

List Each of YOUR children or check here if you never had children []:

Full Name	Age
<input type="checkbox"/> This child is also the child of my spouse.	
<input type="checkbox"/> This child is from a previous relationship	
<input type="checkbox"/> This child passed away	

Full Name	Age
<input type="checkbox"/> This child is also the child of my spouse.	
<input type="checkbox"/> This child is from a previous relationship	
<input type="checkbox"/> This child passed away	

Full Name	Age
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If any of your children have passed away, did they have children?.....[Y] [N]

SECTION IV:

If you are planning on leaving any property or money to someone other than your spouse or child(ren), please list the names of such person(s):

Full Name Y / N
Over Age 21?

Relationship to You (e.g. niece, friend, etc.)

Full Name Y / N
Over Age 21?

Relationship to You (e.g. niece, friend, etc.)

Full Name Y / N
Over Age 21?

Relationship to You (e.g. niece, friend, etc.)

Full Name Y / N
Over Age 21?

Relationship to You (e.g. niece, friend, etc.)

SECTION V:

I want my spouse to be my Executor if he/she survives me [Y] [N] [N/A]

Other than my spouse if checked above, my first choice to be my Executor is:

Name Relationship to Me

My second choice to be my Executor is:

Name Relationship to Me

SECTION VI:

Other Property I own:

Brief Description (e.g. lakehouse, rental house, 50 acres in Texas, etc.)

Address:

County

State

Titled in the name of: _____

A copy of the deed is beneficial but not required.

Brief Description (e.g. lakehouse, rental house, 50 acres in Texas, etc.)

Address:

County

State

Titled in the name of: _____

A copy of the deed is beneficial but not required.

SECTION VII:

Specific Bequests are items that are left to certain persons. I generally advise clients to limit specific bequests to special items such as family heirlooms. Most wills do not have special bequests.

Item

Name of Person Item Left to:

Relationship to Me

Item

Name of Person Item Left to:

Relationship to Me

Item

Name of Person Item Left to:

Relationship to Me

Item

Name of Person Item Left to:

Relationship to Me

Item

Name of Person Item Left to:

Relationship to Me

Item

Name of Person Item Left to:

Relationship to Me