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**WILL QUESTIONNAIRE**

This will questionnaire was prepared to assist U.S. citizens in assembling information necessary to prepare a will, living will, and powers of attorney. These documents are necessary to insure the well being of any person living in Texas who has real estate, stocks, debts, or children.

1. NAME OF WILL MAKER: \_\_\_\_\_  
SOC. SEC. NO.: \_\_\_\_\_ -XX- \_\_\_\_\_ ; DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
ADDRESS: \_\_\_\_\_  
EMAIL: \_\_\_\_\_ PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

MALE       FEMALE  
 MARRIED     DIVORCED W/CHILDREN     SINGLE     WIDOW(ER)

2. SPOUSE: \_\_\_\_\_  
SOC. SEC. NO.: \_\_\_\_\_ -XX- \_\_\_\_\_ ; DOB: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

3. CHILDREN: NUMBER \_\_\_\_\_ FROM PRIOR MARRIAGE \_\_\_\_\_  
Are more/any children expected?  YES       NO  
1. \_\_\_\_\_ ; DOB: \_\_\_\_\_  
2. \_\_\_\_\_ ; DOB: \_\_\_\_\_  
3. \_\_\_\_\_ ; DOB: \_\_\_\_\_  
4. \_\_\_\_\_ ; DOB: \_\_\_\_\_

4. ESTATE: Approximate total value of the assets of the testator: \$ \_\_\_\_\_ (If your estate is less than **2.0 million** for a single person, or **4 million for a married couple**, you can **skip** this section.)

A. Life Insurance      \$ \_\_\_\_\_  
B. Real Estate      \$ \_\_\_\_\_  
C. Investments      \$ \_\_\_\_\_  
D. Cash, Savings      \$ \_\_\_\_\_  
E. Other      \$ \_\_\_\_\_

5. REAL ESTATE:  
\_\_\_\_\_ the spouse is to receive all real estate  
\_\_\_\_\_ the spouse is to receive the homestead only  
\_\_\_\_\_ all real estate is to pass as follows:  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_  
4. \_\_\_\_\_

6. SPECIFIC BEQUESTS, **if any**: (of cash or personal property):

- 6.1: to: \_\_\_\_\_ Description: \_\_\_\_\_
- 6.2: to: \_\_\_\_\_ Description: \_\_\_\_\_
- 6.3: to: \_\_\_\_\_ Description: \_\_\_\_\_
- 6.4: to: \_\_\_\_\_ Description: \_\_\_\_\_

7. GENERAL PERSONAL PROPERTY: (Car, furniture, etc.)

- \_\_\_\_\_ all to the spouse, or to the children if spouse is deceased
- \_\_\_\_\_ all to the children
- \_\_\_\_\_ other: \_\_\_\_\_

8. RESIDUARY ESTATE (**the remainder**): (cash, bank accounts, stocks, etc.)

- The residuary estate is to be divided as follows:
- \_\_\_\_\_ to the spouse outright; or if spouse predeceases me, to the surviving children
- \_\_\_\_\_ other: \_\_\_\_\_

9. MINOR TRUSTS: a beneficiary is to be deemed a "minor" (whose bequests should be held in trust) if he/she is under the age of 18: (Please pick an age for the disbursement of the balance of the trust, all trusts are for the health, education and welfare of the beneficiary unless you specify differently)

- \_\_\_\_\_ 18 \_\_\_\_\_ 19 \_\_\_\_\_ 21 \_\_\_\_\_ 25 \_\_\_\_\_ 30
- \_\_\_\_\_ 25, but 1/2 of the legacy is to be released at age 21
- \_\_\_\_\_ 30, but 1/3 is to be released at age 21, and 1/3 at age 25
- \_\_\_\_\_ 35, but 1/3 is to be released at age 25, and 1/3 at age 30
- \_\_\_\_\_ other: \_\_\_\_\_

10. TRUSTEE (of the minor's trust):

to serve without pay or bond? \_\_\_\_\_ yes \_\_\_\_\_ no

- 1 Name: \_\_\_\_\_
- Address: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- 2. Alternate Trustee: \_\_\_\_\_
- Address: \_\_\_\_\_

11. Guardian of the minors (if the other natural parent is not alive, or if you have reasons to share with the court as to why a natural parent should not be the guardian)

- 11.1: First Choice of Guardian: \_\_\_\_\_
- Address: \_\_\_\_\_
- \_\_\_\_\_

- 11.2: Second Choice of Guardian: \_\_\_\_\_
- Address: \_\_\_\_\_
- \_\_\_\_\_

Please note that a natural parent will be considered as the best choice as guardian of the minor child in most cases. The court will have a hearing as to what is in the best interest of the minor child as to a guardian, if there is convincing evidence of a choice different than the natural parent that survives. You may give me your reasons for not wanting the natural parent to serve as the guardian of the natural children in writing on a separate sheet.

12. EXECUTORS: (Executors are the quarterbacks of the probate process, and the job is simple but important. If my office does the probate, we do the executor's job in that process)

\_\_\_\_\_ Spouse  
\_\_\_\_\_ Other: \_\_\_\_\_; ADDRESS: \_\_\_\_\_  
\_\_\_\_\_ Alternate: \_\_\_\_\_; ADDRESS: \_\_\_\_\_

You may want to specify funeral issues, **but it is not required, and you may skip this question.**

13. Burial \_\_\_\_\_; Cremation \_\_\_\_\_  
Specifics (if any such as location of cemetery) \_\_\_\_\_

14. TAX SAVING TRUSTS FOR ESTATES OVER 2.0 million for single or 4 million for married couples.

(YES \_\_\_\_\_) (NO \_\_\_\_\_)

Do you want to save estate taxes by using a credit shelter trust? If so, the beneficiaries shall be:

\_\_\_\_\_ Spouse  
\_\_\_\_\_ Spouse and children; if you choose to include children, do you want the proceeds in a trust for the children under the same terms as #9? \_\_\_ yes \_\_\_ no

15. Your Will package will include: Will, Durable Power of Attorney and Directive to Physicians (sometimes referred to as the "living will", and a medical power of attorney.

A: 15.1: Power of attorney: (Spouse \_\_\_\_\_ and/or Other \_\_\_\_\_  
15.2: Address of Other: \_\_\_\_\_  
\_\_\_\_\_

B: 15.3: Medical Power of Attorney: Spouse \_\_\_\_\_ and/or Other: \_\_\_\_\_  
15.4: Address of Other: \_\_\_\_\_  
\_\_\_\_\_

Please note that it is better to have local parties (in state) as compared to out-of-state appointments

16. The general power of attorney can be made effective immediately, or it can be activated upon an event, such as a disability:

\_\_\_\_\_ effective immediately  
\_\_\_\_\_ effective upon my disability

17. FEES PER WILL: (2009)

**Please note: these are the starting prices, and may increase under unusual circumstances.**

Simple Will without Trusts = starting at \$750.00

Will with a Minor's Trust = starting at \$1,250.00

**Each spouse needs a separate Will. We will not prepare joint Wills.**

**Therefore, for a husband and wife, the costs of Wills will be twice the above quoted prices.**

Belt's office procedures: I will prepare your Will and send you a draft of it for your review, and after any corrections, we will set an office appointment on a morning so that your documents can be signed before a notary public and two witnesses. I receive one-half ( $\frac{1}{2}$ ) of the fee quoted above at time of starting and the remaining one-half ( $\frac{1}{2}$ ) of the fee at the completion and signing. I will accept cash, check, MasterCard, Visa, and Discover credit cards for my legal fees.