

Law Offices of

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**CLIENT QUESTIONNAIRE FOR PREPARATION OF
WILLS AND/OR TRUSTS**

I. Your Full Legal Name:

Date of Birth:

Social Security Number:

Current Address:

Phone Number(s):

II. Your Spouse (if any)

Name:

Date of Birth:

Social Security Number:

III. Children from Current Marriage (if any)

- a) Name:
Date of Birth:
- b) Name:
Date of Birth:
- c) Name:
Date of Birth:
- d) Name:
Date of Birth:

IV. Children from Prior Current Marriage(s) or Relationship(s) (if any)

- e) Name:
Date of Birth:
- f) Name:
Date of Birth:
- g) Name:
Date of Birth:
- h) Name:
Date of Birth:

V. Assets

List all significant assets owned by you including real estate, stocks, bonds, mutual funds, pensions, 401(k) plans, etc. For each asset, include its approximate value and/or the equity you have in the asset.

VI. Life Insurance

List all life insurance policies carried on your life. Include the values of the death benefit and the current cash value.

VII. Guardian

If you have any children under the age of 18, you will need to appoint a guardian to take over their care in the event you die or become disabled before the child reaches majority age. We recommend you advise all potential guardians of your selection to make sure they are willing to take on the responsibility. Please list your choices for guardian and their relationship to you below. We recommend you select more than one individual in the event your first choice is unable or unwilling to serve.

VIII. Executor or Trustee

You need to appoint an executor and/or a trustee to administer your estate when you die or become disabled. We recommend you advise all potential executors/trustees of your selection to make sure they are willing to take on the responsibility. Please list your choices for executor/trustee and their relationship to you below. We recommend you select more than one individual in the event your first choice is unable or unwilling to serve.

IX. Medical Decisions

You need to appoint someone to make medical decisions for you should you become disabled. We recommend you advise this person of your selection to make sure they are willing to take on the responsibility. Please list your choices for executor/trustee and their relationship to you below. We recommend you select more than one individual in the event your first choice is unable or unwilling to serve.

X. Specific Bequests of Personal Property

Upon your death, your heirs will be allowed to take or sell your personal property as they see fit with any disputes to be resolved by your executor/trustee. However, many people have family heirlooms or other items of personal property which hold great sentimental value. If you have any such belongings and wish to designate the party who will inherit them, please list the items below with the name and relationship of the person who will receive them.

XI. Distribution of Estate

Please list below how you would like your estate distributed. You are free to include or exclude anyone as an heir. You may designate a percentage of your estate to each party. You may also make gifts of a specific amount. For each party listed, include their relationship to you.

If you have minor children or named heirs, any share of your estate that passes to them will be put in a trust until they reach whatever age you designate. The trustee you designated above would hold the assets for the benefit of the child.

Ordinarily, your executor or trustee would liquidate your estate by selling all of your assets. The net proceeds are then distributed per your direction. If there are any assets you want retained rather than sold, please list them and the reason for retention below.

XII. Charitable Contributions

Many people like to make charitable bequests upon their death. Consider those non-profit organizations (church/chapel/synagogue, private school or college, disease or illness research and treatment groups, etc.) that have meant the most to you and/or had a great impact on your life. List any donations you wish to make below.

XII. Disclaimer

I understand that the Law Offices of Thaddeus M. Bond, Jr. & Associates, P.C. is not a tax adviser and should not be relied upon for advice as to federal, state or local taxes.

I/we also understand that The Law Offices of Thaddeus M. Bond, Jr. & Associates, P.C. is licensed to practice law only in the State of Illinois. Any issues relating to laws in States other than Illinois might or could be directed by the Law Offices of Thaddeus M. Bond, Jr. & Associates, P.C to competent legal counsel in that state.

Name:

Date

Name:

Date