

A Fifty (\$50.00) Dollar discount will be given on the total bill for preparation of wills, trusts, and other estate planning documents if this questionnaire is printed, completed and presented to the attorney at the initial meeting to gather information for the preparation of said documents.

CLIENT WILL QUESTIONNAIRE

	<u>Full Name</u>	<u>Birth Date</u>
1.	_____	_____
	(Husband)	
	_____	_____
	(Wife)	

	(Mailing Address)	
	_____	_____
	Telephone (Home)	Telephone (Work)

	E-Mail Address	

2. FAMILY:

A)	<u>Children</u>	<u>Birth Date</u>
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____

B) Prior Spouse Information _____
 (Name, Date, Parish of Final _____
 Decree, Copy of Community _____
 Property Settlement, Docket _____
 No. and Children) _____

C) Adoptions? _____

3. INSURANCE:

Company	Policy #	Face Amount	Insured	Beneficiary	Cash Value
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

4. LIABILITIES - complete the value for each item listed below and designate as separate or community. Use total approximate dollar amount only and do not describe in any detail except for amounts listed under "other."

	Community	Separate
a) Mortgages:	_____	_____
	_____	_____
b) Notes Payable:	_____	_____
	_____	_____
c) Average approx. outstanding amt. of charge accts.	_____	_____
	_____	_____
d) Other	_____	_____

5. Anticipated Inheritance from Parents.

6. Buy/Sell Agreements with regard to closely held corporate stock.

7. Inventory of assets covered by Will - complete the value for each item listed below and designate as separate or community. Use total approximate dollar amounts only and do not describe in any detail except for amounts listed under "other."

<u>Description</u>	<u>Value</u>	
	<u>Community</u>	<u>Separate</u>
Cash in all banks, including checking and savings accounts		
_____	_____	_____
_____	_____	_____
Accounts or notes receivable		
_____	_____	_____
Publicly held stocks, bonds or other securities		
_____	_____	_____
_____	_____	_____
_____	_____	_____
Closely held corporate stocks or other securities		
_____	_____	_____
_____	_____	_____

<u>Description</u>	<u>Value</u>	
	<u>Community</u>	<u>Separate</u>
Unincorporated Business		
_____	_____	_____
Partnership Interests		
_____	_____	_____
Residence - house and lots		
_____	_____	_____
Household furnishings and personal effects		
_____	_____	_____
Vehicles		
_____	_____	_____
_____	_____	_____
_____	_____	_____
Real Estate (non-residence)		
_____	_____	_____
_____	_____	_____
_____	_____	_____
Other (description):		
	_____	_____
	_____	_____
8. NON-PROBATE ASSETS:		
Retirement plans		
_____	_____	_____
Value of IRA Accounts		
_____	_____	_____
Annuities		
_____	_____	_____
Other (description):		
	_____	_____
	_____	_____