



DEBORAH L. DUNSMORE

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WILL INTAKE QUESTIONNAIRE

A. GENERAL INFORMATION ABOUT YOU

HUSBAND/WIFE

1. Full Name (Husband) _____
Also Known As: _____

Usual Signature _____

2. Home Address: Street Address _____
Post Office Box: _____
City _____ County _____ State _____
Zip Code _____

3. Home Phone: _____

4. Business Phone: _____

5. Date of Birth: (Husband) _____ (Wife) _____

6. Social Security No.: (Husband) _____ (Wife) _____

7. Email Address: (Husband) _____

Email Address: (Wife) _____

(If permissible for communicating with you)

B. GENERAL INFORMATION ABOUT YOUR CHILDREN AND/OR GRANDCHILDREN (If you have either)

Your **Children:**

Full Name(s), Date of Birth, Address(es):

1. _____

- 2. _____
- 3. _____
- 4. _____

1.

Do any of your children have any special needs: If so, please explain:

Your Grandchildren:

Full Name(s), Date of Birth, Address(es):

- 1. _____
- 2. _____
- 3. _____
- 4. _____

C. FINANCIAL INFORMATION (Show Estimated Value Under Column in Whose Name Asset is Owned).

ASSETS:

	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>	<u>Total</u>
Cash:				
Checking	\$ _____	\$ _____	\$ _____	\$ _____
Savings	\$ _____	\$ _____	\$ _____	\$ _____
Money Market	\$ _____	\$ _____	\$ _____	\$ _____
CD's	\$ _____	\$ _____	\$ _____	\$ _____

Publicly Traded Securities:

	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>	<u>Total</u>
Stocks	\$ _____	\$ _____	\$ _____	\$ _____
Bonds	\$ _____	\$ _____	\$ _____	\$ _____
Mutual Funds	\$ _____	\$ _____	\$ _____	\$ _____

Closely Held Business

(Corporations, Partnerships)

List the name & the percentage owned

1.	_____	\$ _____	\$ _____	\$ _____
2.	_____	\$ _____	\$ _____	\$ _____
3.	_____	\$ _____	\$ _____	\$ _____

2.

Real Estate:

Personal Residence \$ _____

Other Real Estate (Describe):

1.	_____	\$ _____	\$ _____	\$ _____
2.	_____	\$ _____	\$ _____	\$ _____
3.	_____	\$ _____	\$ _____	\$ _____

Retirement Plans:

IRA \$ _____ \$ _____ \$ _____ \$ _____
(Beneficiary _____)

Profit Sharing \$ _____ \$ _____ \$ _____ \$ _____
(Beneficiary _____)

Pension \$ _____ \$ _____ \$ _____ \$ _____
(Beneficiary _____)

	<u>Husband</u>	<u>Wife</u>	<u>Joint</u>	<u>Total</u>
Miscellaneous Assets:				
Notes/Mortgages Payable to You	\$ _____	\$ _____	\$ _____	\$ _____
Cash Value of Life Insurance	\$ _____	\$ _____	\$ _____	\$ _____
Personal Property (Cars, Jewelry, Furniture, etc.)	\$ _____	\$ _____	\$ _____	\$ _____
Other (Describe) _____	\$ _____	\$ _____	\$ _____	\$ _____
TOTAL ASSETS	\$ _____	\$ _____	\$ _____	\$ _____
NET WORTH	\$ _____	\$ _____	\$ _____	\$ _____
	Husband	Wife	Joint	Total

D. LIFE INSURANCE SUMMARY

Provider, Type, Amount, Owner, Beneficiary, Value of Policy

1. Husband's Life Insurance

Provider: _____
Type of Insurance: _____
Amount of Insurance: _____
Owner: _____
Beneficiary: _____
Value of Policy: _____

3.

2. Wife's Life Insurance:

Provider: _____
Type of Insurance: _____
Amount of Insurance: _____
Owner: _____
Beneficiary: _____
Value of Policy: _____

E. BENEFICIARIES TO ESTATE

1. Who are the primary beneficiaries of your estate (spouse, children, other family members, charities, etc.)?

2. Would you like to leave any assets at your death to charity? Yes ____ No ____
If yes, please name charity or charities and amounts of percentages: _____

3. If the other parent of your minor children (under age 19) does not survive you, who should be named as guardian of the minor children?

Initial Guardian: _____
Address: _____
Successor Guardian: _____
Address: _____

4. At what age should a child receive an inheritance? _____

5. Who should manage your estate (i.e., executor) after you are gone (family member, institution, other advisor)?

Initial Executor: _____
Address: _____
First Successor Executor: _____
Address: _____

6. Residue (The residue is the remainder of your estate that is not specifically bequeathed below to a certain beneficiary – normally to your spouse and then to children).

A. Primary _____

B. Secondary _____

4.

7. Specific Devices/Bequests of Personal Property (Be specific in your description of what item is being gifted and to whom it is being gifted)

A. Spouse _____

B. Children _____

C. Relatives _____

D. Friends _____

8. Simultaneous Death Provision

If you and your spouse should die simultaneously, which of you should be considered to have passed first? This determines whose Will is the last to be probated and thus ultimately controlling. _____
_____.

F. ADDITIONAL INFORMATION

Please list below any information which would not fit on the preceding pages. Please reference the section to which the information relates. _____

5.

Please list below any additional information not requested which you feel is important. _____

G. DOCUMENTS TO BRING TO THE INITIAL CONFERENCE.

Present Wills