

WILL QUESTIONNAIRE

1. _____
Your Name S.S.N. Telephone _____

Date of Birth

2. _____
If Married, Name of Spouse S.S.N. _____

Spouse's Date of Birth

3. _____
Mailing Address

4. _____
City or County of Residence

5. Names and ages of all children. Please list all children, whether now living or deceased, and indicate whether any are adopted or are children from a prior marriage, etc.

_____	_____
Name	Date of Birth
_____	_____
Name	Date of Birth
_____	_____
Name	Date of Birth

(Continue with additional names on reverse side.)

- 6. Do you own any real estate or personal property located outside Virginia?
- 7. If married, have you during this marriage lived in Arizona, California, Idaho, Louisiana, New Mexico, Nevada, Texas, Washington, or Wisconsin?
- 8. Do you have any trusts for yourself or other family members? Are you a party to any Buy-Sell Agreement, Stock Purchase Agreement or partnership? If so, please bring a copy of the trust or other document to our appointment.
- 9. Please indicate approximate size of the estate (including life insurance, real estate, retirement plans, and all other assets).
- 10. Please provide a summary of your assets on the attached sheets A and B. Indicate how property is owned (your name, spouse's name, or joint names), include cash value and face value of life insurance and beneficiary, and value of all assets taken into account in answering 9. above. You may substitute a recent financial statement for sheets A and B. If you have questions about any of your assets, such as the form of ownership or beneficiary designation, please bring in the relevant paperwork.

11. Do you have living wills or powers of attorney?
12. If you have minor children, you may want to name a Guardian for your child(ren). Please list the proposed Guardian below. Before you list them, you should discuss this with them.

13. You should also name an Executor.

14. With minor children, you may be creating a trust for the benefit of your minor children. You should name a Trustee for the trust.

15. Do you want to make any specific bequests to any charities or any other persons or entities? If so, please list them on a separate sheet.

SHEET "A"

Asset Summary

	Husband	Joint	Wife
Life Insurance			
Residence			
Other Real Property			
Bank Accounts			
Marketable Securities			
Tangible Personal Property			
Other Substantial Assets (Including Retirement Plan Accounts)			
Subtotal:	\$ _____	\$ _____	\$ _____
Less Debts:	_____	_____	_____
Estimated Net Estate:	\$ _____	\$ _____	\$ _____

NOTES:

