

Wills Questionnaire

Date: _____

PERSONAL BACKGROUND

1. Your Information

Full Legal Name: _____ Date of Birth: _____

Mailing Address: _____

Telephone (home): _____ Telephone (work): _____

Marital Status: _____

2. Spouse's Information

Name: _____ Date of Birth: _____

Address (if different from yours): _____

Check one: Legally married on: _____
 Common law as of: _____
 Separated on: _____

3. Previous Marriages (if any)

Name: _____ Date of Marriage: _____

Check one:

Deceased on: _____ Divorced on: _____

[If divorced, review any Settlement Agreement and the Divorce Order]

7. Representatives

	Name	Address	Relationship
Executor			
Co-Executor (if any)			
Alternate			

Trustee (if different from Executor)			
Co-Trustee			
Alternate			

Guardian			
Alternate			

8. Specific Bequests or Gifts

Beneficiary	Item or Amount	Relationship	Lapse or Gift Over

9. Special Instructions

10. Other Provisions

Funeral/burial arrangements [ensure testator advises executor]

Family law clause:

Questions or Other Information: