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** Date of Birth: Address (if different from yours): ☐ Legally married on: _____ Check one: ☐ Common law as of:_____ ☐ Separated on: **3.** Previous Marriages (if any) Name: Date of Marriage: Check one: ☐ Deceased on:_____

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

☐ Divorced on:

4. Children & Dependents

Children: Please list all children below. Include and indicate those born outside of marriage, adopted children, children of spouse by previous relationship and not adopted, etc.

Full Name	Date of Birth (or age)	Address (if different from yours)	Special Needs/ Support Obligations

5. Other Dependents

Full Name	Relationship to You	Date of Birth (or age)	Address (if different from Yours)	Support Obligations

6. Other Beneficiaries

(eg., charities, friends, and relatives)

Full Name	Address	Relationship

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
Fune	eral/burial arrangements [ensure testator advises executor]
Fam	ily law clause:
Ques	stions or Other Information:
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