



Law Office Of Derbha H. Jones, P.L.L.C.

Derbha H. Jones, Attorney

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National Certified Guardian

Certified Ad Litem, State Bar of Texas

Licensed Mediator, State of Texas

Questionnaire – Will Preparation

1. Provide your full name, AND names that you are commonly known as; your address and phone number and date of birth.

2. Have you ever had a will prepared on your behalf? If so, please provide a copy of the same.

3. Provide the full name of your spouse, date of birth (if applicable). Indicate if you have been married before and whether you have stepchildren currently.

4. Provide the full names of biological children, (whole and half), dates of birth and current addresses.

5. To whom do you desire to leave your property? Example:
 - ❖ Entire estate to spouse
 - ❖ To children in equal parts; different portions to various persons, specific items to various persons (i.e. children, grandchildren, spouses, friends, family members, etc.).
 - ❖ Explain in simple detail to be further discussed with attorney at later time.

6. Name the person to serve as executor of your will. This is the person you believe will carry out your desires listed in your last will. Also provide date of birth, addresses and phone numbers for this person.

7. Name an alternate person to serve as alternate executor. (if you desire an alternate executor)

8. If you leave property to your children, what happens to their share if they don't survive you? Do you leave the property to that person's children or to your other children equally?

9. If you leave property to your spouse, what happens to the property if he does not survive you?

10. Is there anyone who should **not** serve as executor of your will?

11. Is there anyone you specifically wish to leave out of your will?

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12. Do you own property from a prior marriage? Please describe.

13. Are there very specific gifts that you would like to have written in your will? (If so, then list the gifts and the person to receive the gift.) If you gift money, then designate the account or where the money should be taken from.)

14. Would you like to have any instructions regarding your burial written in your will? (If so, define.)

15. If you have other things that you would like to discuss regarding your will, feel free to list herein or you can discuss later with the attorney.

16. If you leave property to a child who is a minor on the date you execute your will, Would you like for that child's share to be left in trust for the minor's use.

17. Name the person that you desire to serve as trustee in the event your spouse is unable to serve as trustee of the minor's trust.

18. At what age would you like for the minor to have control of his/her trust assets.

19. Please make a list of all financial accounts (i.e. savings, checking, 401K, stocks, bonds, insurance policies). Then make sure that all accounts have a designated beneficiary who is over the age of 18 or to a trustee for minors. This will allow for those assets to pass outside of the Probate estate and will be distributed prior to Probate of the will to the person designated with the financial company.

Again, thank you for considering my office for the drafting of your estate documents, and feel free to contact me with any questions.

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