

**PRESIDIO OF MONTEREY LEGAL ASSISTANCE
BASIC ESTATE PLANNING QUESTIONNAIRE**

For clients with less than \$5,000,000 in property, including life insurance.

NOTES: Please read the attached information pages prior to filling out this documentation. This office will only create a will for the party or parties present at the interview. This form will need to be completed prior to your appointment and brought with you to your interview. Please type or print neatly.

PERSONAL INFORMATION

Marital Status (Check all that apply)	SVCMBRS	<input type="checkbox"/>	MARRIED	<input type="checkbox"/>	SINGLE	<input type="checkbox"/>	WIDOWED	<input type="checkbox"/>	DIVORCED
		<input type="checkbox"/>	SEPARATED OR ABOUT TO DIVORCE						
	SPOUSE:	<input type="checkbox"/>	MARRIED	<input type="checkbox"/>	SINGLE	<input type="checkbox"/>	WIDOWED	<input type="checkbox"/>	DIVORCED
		<input type="checkbox"/>	SEPARATED OR ABOUT TO DIVORCE						
SVCMBR'S Name	(First, Middle, Last)			SSN (Full)			Date of Birth		
SPOUSE'S Name	(First, Middle, Last)			SSN (Full)			Date of Birth		
Home Address	City			State			Zip Code		
Mailing Address (if different from above)	City			State			Zip Code		
Home Telephone	SVCMBR'S Cell Phone			SPOUSE'S Cell Phone					
SVCMBR'S Command/Employer/Retired	SVCMBR'S Occupation		SVCMBR'S Rate/Rank, Branch of Service				Time in SVC		
SPOUSE'S Command/Employer/Retired	SPOUSE'S Occupation		SPOUSE'S Rate/Rank, Branch of Service				Time in SVC		

CIRCLE OR FILL IN YOUR ANSWERS

SVCMBR

SPOUSE

Do you have a will or trust now?	YES	NO	YES	NO
In which state do you vote?				
In which state do you plan to retire/live permanently?				

YOUR PLAN OR DISTRIBUTION

In the following section you will tell us how you want your property distributed at the time of your death. If you need more room, please use additional paper. REMEMBER: If you and your spouse do not want the same distribution plan, you will each need to specify those individuals within this form.

BENEFICIARIES

Special gifts to Individuals

Legal name of person & relationship	Dollar amount or accurate description of gift	Alternate beneficiary (if any)

Special gifts to organization (charity, foundation, religious, educational, paternal, etc.)

Name of organization and address	Dollar amount or accurate description of gift	Alternate beneficiary (if any)

Distributing the rest: Primary Beneficiaries

After the special gifts listed previously (if any) have been distributed, who should receive the rest of your estate?

Check here if you want your spouse to receive all of your remaining estate, and if your spouse dies, then equally to your surviving child(ren). You may select this option even if you and your spouse do not currently have children but expect to have children in the future.

If you did not check the box above, please complete:

Legal name of person (first, middle, last)	Relationship	Percentage (must add up to 100%)

Alternate Beneficiaries

List those that will receive your estate if you (and your spouse and child(ren), if any) outlive the beneficiaries named above.

Legal name of person (first, middle, last)	Relationship	Percentage (must add up to 100%)

If one of your children dies, do you want that child's share to go to that child's child(ren), your grandchild(ren) (per stirpes) or do you want that child's share to be divided among your remaining living child(ren), with nothing going to your grandchild(ren) whose parent died (per capita)?

List any individuals that you specifically want to disinherit so that they receive nothing from your estate.

Legal name of person (first, middle, last)	Relationship

SERVICEMEMBER'S GROUP LIFE INSURANCE (SGLI)

If you are on active duty, this is often a large part of your estate and is an important part of the estate planning. List the beneficiaries exactly as they appear in your service record.

Name of beneficiary	Relationship	Share to each: use %, \$ amounts or fractions	Payment Option (lump sum or 36 payments)
Principal			
1.			
2.			
Contingent			
1.			
2.			
3.			
4.			

CHOOSING THE PEOPLE THAT WILL TAKE CARE OF YOUR AFFAIRS AFTER YOUR DEATH

Personal Representative/Executor/Executrix: This person (often a spouse or relative) manages the probate and settlement of your estate.

In Svcnbr's Will	In Spouse's Will
Full legal name:	Full legal name:
Relationship:	Relationship:

Successor Personal Representative/Executor/Executrix: Back up manager that takes over if your first Personal Representative or Executor/Executrix dies or resigns. Has same restrictions as above.

In Svcnbr's Will	In Spouse's Will
Full legal name:	Full legal name:
Relationship:	Relationship:

Must the Personal Representative or Executor/Executrix be bonded or insured to protect your beneficiaries (the insurance or bond will be paid with funds from your estate)? Yes No

YOUR CHILD(REN)

Full legal name (First, Middle, Last)	Age	T=From This Marriage If P (Previous), Whose? Svcnbr or Spouse	Child Married? Y or N	# of Grandchildren

If you have step-child(ren) or adopted child(ren), do you want your will to state that they are to be treated under your will like natural born child(ren)? Yes No

If you have child(ren) from a previous marriage, do you want to guarantee they receive an inheritance from you ? _____

FOR CLIENTS WITH MINOR CHILD(REN)

GUARDIAN OF THE PERSON: This person raises your child(ren) if both parents die. Ask the attorney about exceptions. The guardian with whom the child(ren) lives is generally the person who manages the child(ren) money but does not have to be. The money manager is normally the Trustee - see Leaving Property for Minor Children below.

Primary Guardian of the person

In Svcmb'r's Will	In Spouse's Will
Full legal name:	Full legal name:
Relationship:	Relationship:

Successor Guardian of the person

In Svcmb'r's Will - Alternate	In Spouse's Will - Alternate
Full legal name:	Full legal name:
Relationship:	Relationship:

LEAVING PROPERTY FOR MINOR CHILD(REN)

If you leave money to minor child(ren) without further instructions, the money will be placed in a guardianship of the property. This method does not provide as much flexibility for managing the funds as other options allow, and all the money will be given to your child(ren) when they reach age 18, which may be too early.

The alternative is a trust. This allows the money to be managed by someone you trust until the child(ren) reach any age you choose. The person managing the money (called a trustee) has more flexibility in deciding how to invest the money, and the trustee may use the money throughout your child(ren)'s life(s) for health, education, and other needs - even before they reach the age at which the money is given to them in a lump sum.

If the money has not been used up for your child(ren)'s health, education, etc., give the remainder as follows (choose one):

Give it to my child(ren) in one lump sum at age _____

Give it in installments as follows (choose one):

1/2 at 21 and 1/2 at 25

1/3 at 21, 1/3 at 25, 1/3 at 30

1/3 at 25, 1/3 at 30, 1/3 at 35

Customize installments as I describe here (max 3 equal payments): _____

TRUSTEE: The trustee should not be one of the older children, or anyone else who may share in the property as they will have a conflict each time they make a decision.

Primary Trustee

In Svcmb'r's Will	In Spouse's Will
Full legal name:	Full legal name:
Relationship:	Relationship:

Successor Guardian of the person

In Svcmb'r's Will - Alternate	In Spouse's Will - Alternate
Full legal name:	Full legal name:
Relationship:	Relationship:

Must the trustee be bonded or insured to protect your beneficiaries (the insurance or bond will be paid with funds from your estate)?

Yes No

ADVANCE MEDICAL DIRECTIVES (LIVING WILL) AND POWERS OF ATTORNEY

A living will makes your wishes known to family and doctors regarding life support and other medical decisions in the event you become terminally ill or injured with no hope for recovery. Do you want a living will?	Svcnbr		Spouse	
	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Upon your death, do you wish to donate your organs?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO
For transplants?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO
For science or medical research?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If practical, do you want your family to remove you from a hospital or nursing home so you can die at home?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Who do you wish to appoint an agent to carry out the instructions you set forth in your living will?

For Svcnbr	For Spouse
1st Choice:	1st Choice:
Full legal name (First, Middle, Last)	Full legal name (First, Middle, Last)
Address	Address
Phone Number	Phone Number
2nd Choice:	2nd Choice:
Full legal name (First, Middle, Last)	Full legal name (First, Middle, Last)
Address	Address
Phone Number	Phone Number

DURABLE POWER OF ATTORNEY

A *Durable Power of Attorney* gives broader protection. This form grants the agent powers to make legal and business transactions on the grantor's behalf if the grantor becomes disabled or incapacitated. Do you want to appoint someone (spouse, child, friend) to make decisions for you when you are incapacitated, but not necessarily terminal? If so, provide the following or check this box if you want the same people you listed above.

For Svcnbr	For Spouse
1st Choice:	1st Choice:
Full legal name (First, Middle, Last)	Full legal name (First, Middle, Last)
Address	Address
Phone Number	Phone Number
2nd Choice:	2nd Choice:
Full legal name (First, Middle, Last)	Full legal name (First, Middle, Last)
Address	Address
Phone Number	Phone Number

Note: After you meet with the attorney to discuss your estate plan, the attorney will draft the documents. Once your attorney has finished drafting your estate documents, you will review the documents in the office. The draft will not leave the office. The documents will be executed following the final review.