

FUNERAL ARRANGEMENTS

You should immediately make known to your family members your preferences for funeral arrangements. Funeral arrangements are normally completed before a Will is located and read. You should communicate your desires to your next of kin now, either in writing or by verbal direction.

Soldiers who are unmarried with parents who do not live together should complete DA Form 7302, Disposition of Remains Statement, in which Soldiers identify the person authorized to direct disposition of remains. DA Form 7302 is processed by the unit personnel section.

- Put no burial preference statement in my Last Will and Testament
- Cremation (A)
- Donate my body for medical or scientific purposes (B)
- Buried with full military honors (available with other options) (C-D)
- Burial at a specified location: _____
- Other: _____

Does you wish to include instructions to distribute American flags to people specified as part of your military honors? If so, please state below:

Have you already made arrangements with regard to your funeral? If so, please state below:

Do you wish to include instructions regarding your funeral arrangements being carried out according to the custom and ceremony of a religious/other denomination/non-religious memorial service? If so, please state below:

ADVANCED MEDICAL DIRECTIVE AND LIVING WILL

An Advanced Medical Directive designates **someone** to make medical decisions for you if you are not able to make them for yourself and a Living Will designates your personal choices about procedures, medications, and/or end-of-life medical treatment, if you are not able to make them yourself.

Do you want to create an Advanced Medical Directive? YES

Do you want to create a Living Will? YES

Who would you like to appointment to make medical decision for you, if you are unable to make those decisions yourself?

PRIMARY DESIGNEE: Name: _____

Address: _____ Phone Number: _____

ALTERNATIVE DESIGNEE: Name: _____

Address: _____ Phone Number: _____



ESTATE PLANNING QUESTIONNAIRE

For people WITH CHILDREN (minor or adult)

Privacy Act Statement: AUTHORITY: 10 USC § 3013. PRINCIPAL PURPOSE: To assist Fort Stewart Legal Services Center personnel who advise on and prepare estate planning documents. ROUTINE USES: To provide legal personnel with sufficient information to advise on and prepare estate planning documents. MANDATORY OR VOLUNTARY DISCLOSURE AND EFFECT ON INDIVIDUAL BY NOT PROVIDING INFORMATION: Disclosure is voluntary. Nondisclosure prohibits effective estate planning assistance.

Read this questionnaire carefully, answer all questions completely, and print all information clearly. We must be able to read your handwriting!

Return this completed questionnaire to the Fort Stewart Legal Assistance Office for preparation of estate planning documents.

Contact the Fort Stewart Legal Assistance Office in Building 620, Fort Stewart, GA.

usarmy.stewart.forscom.mbx.fsga-legal-assistance-office@army.mil

PERSONAL INFORMATION

Your full name: _____

DoD ID Number: _____ DOD Expiration Date: _____

Status (check all that apply):

- Active Duty Single Male
- Military Retiree Married Female
- Family member Separated or divorcing

U.S. Citizen Non-U.S. Citizen

Sponsor Unit or Employer: _____ Rank/PayGrade: _____

Current mailing address: _____

Telephone numbers: _____

Electronic mail address: _____

Spouse full name: _____

Your spouse is a: U.S. Citizen Non-U.S. Citizen

YOUR BENEFICIARIES

- Do you have a current Will or Trust?
- Do you have a pre-nuptial or post-nuptial agreement?
- Do you own a farm or family business?
- Do you have a power of appointment? (A power of appointment is NOT a power of attorney.)
- Are you named in a divorce decree that divides pension, insurance or other property rights?

Legal Residence. Your place of legal residence governs disposition of your estate. You have one place of residence, which you retain until you terminate residency there and establish residency in a new state or country. If you list more than one state or country in this section, you risk future tax assessments by each state providing you services.

- What do you consider your legal place of residence (state or country)? _____
- In what state/country do you intend to retire and live permanently? _____
- In what states do you file state tax returns? _____
- What state issued your driving license? _____
- What state issued your vehicle titles? _____
- In what states or countries do you own real estate? _____
- In what state are you registered to vote? _____
- In what state did you last vote, personally or by absentee ballot? _____

YOUR EXECUTOR

Executor or Personal Representative: Your Executor ensures your estate is settled upon your death. Settling the estate ordinarily involves going through probate, a court-administered procedure for settling an estate as provided in a Will or under state law. Any adult may serve as your Executor, although many states require an Executor be a U.S. citizen or a legal resident of the state where probate is conducted. You should select family members or responsible friends who are residents of the same state as your legal residence.

Primary Executor:

- My spouse.
- Other. Complete the following:

Full name of person	Relationship to you

Alternate Executor: Identify the person to be your Executor if your Primary Executor fails to serve as Executor for any reason.

Full name of person	Relationship to you

Executors and Personal Representatives are often bonded or insured to protect against the misuse of your property. The bond will be purchased and paid for with funds from your estate. Do you want your Executor or personal representative to be bonded or insured to protect your beneficiaries?

- Yes No

Do you want to entitle your executors or trustees reasonable compensation for the duties performed in accordance of this instrument and any trusts created hereunder?

- Yes No

Primary Beneficiaries: When you die, who is to receive the remainder of your property?

Check only one block.

- All to my spouse, if I die first, and to our children if my spouse dies before me.
- All to my spouse.
- All to my children.
- Other: Give names, relationships to you, and percentages (must add up to 100%).

Alternate Beneficiaries: In the event your Primary Beneficiary/ies die(s) before you die, you can name alternate beneficiaries to receive your property. Give names, relationships to you, and percentages (must add up to 100%).

If one of your children dies before you, do you want that child's share to go to that child's children (your grandchildren)? *per stirpes*

OR

Do you want that share to be divided among your surviving children (*nothing* to a grandchild whose parent dies before you)? *per capita*

Do you wish to include a clause discouraging beneficiaries from contesting the probate and validity of the will and associated trust?

- YES NO

Disinheriting: List the name and relationship of relatives or others you specifically want to disinherit (you want them to receive nothing). Note that if you wish to disinherit your spouse, in most states a spouse has a "right of election" by which the spouse may elect to receive a statutory share instead of receiving an inheritance provided by a Will. In many states the statutory share is one-third or more of the augmented estate, which includes all assets, account, properties, and life insurance policies. For example, if you leave your spouse nothing or a small amount of property, your spouse may be able to receive one-third of the estate value instead of what you desired.

LEAVING PROPERTY TO MINOR CHILDREN

If your minor child inherits financial assets from you without further instructions, the money may be placed in a Guardianship *of the Property*. A Guardianship of the Property means your child’s Guardian will manage the assets for the child, and distribute any remainder when the child reaches the age you choose, up to age 21. The guardian may use the child’s inheritance to pay for the child’s health, education, welfare, or maintenance, at the Guardian’s discretion and under court supervision. The Guardian of the Property may be responsible for financial assets as well as the personal property that passes to children.

An alternative is to give your property to a Trustee IN TRUST, for the benefit of child beneficiaries until the beneficiaries reach the distribution age you choose. The Trustee will manage the Trust and prepare and file annual tax returns. Although the Trustee’s primary purpose is to safeguard the inheritance, the property can also be used for a child’s health, education, welfare, or maintenance, at the Trustee’s discretion. The final distribution age for a Trust can be any age over age 18. Trusts normally consist of financial assets, personal property will probably be managed by the child’s Guardian, or the Guardian of the Property.

If you have life insurance, including SGLI, you may direct that the proceeds of the insurance policy be placed into a Guardianship or Trust you create. If you include Guardianship or Trust language in your Will, you should ask your lawyer for specific language to use to identify your life insurance beneficiaries. You should be sure your SGLV-8286 shows the beneficiary language your lawyer helps you choose.

- Trust Provisions:** No Trust
 A single (pooled) Trust for all children
 A separate Trust for each child

If property and money in the Trust has not been spent for the children’s health, education, and welfare, at what age do you want the remainder of the Trust to pass to the children: _____

Trustee: Your Trustee should be a person you trust or corporation (bank or other institution), and must be a U.S. corporation or citizen. Your Trustee should *not* be an older child or anyone else who may share in the Trust, as they will have a conflict of interest when making decisions concerning Trust assets.

Primary Trustee: (cannot be your spouse, unless your estate skips directly to children)

Full name of corporation or person	Relationship to you

Alternate Trustee:

Full name of corporation or person	Relationship to you

Trustees are often bonded or insured to protect against the misuse of property. The bond will be purchased and paid for with funds from your estate. Do you want your Trustee to be bonded or insured to protect your beneficiaries? Yes No

YOUR ESTATE ASSETS

Does the total value of your estate exceed \$1,000,000? This includes life insurance policies, real estate, personal property, business or farm, investment account, retirement accounts, etc.
 YES NO

Do you have a life insurance policy/ies? If so, do you want to your will to include language for the distribution of the policy/ies? If yes, please detail below:

Do you own any real estate? YES NO

Do you own a business? YES NO
If yes, please indicate the name of the business and if you are the sole owner or partnered with others. If you are not the sole owner, please state your percentage of ownership.

DIGITAL ASSETS

Do you wish to include all digital assets and devices encompassed by his or her Apple ID?
 YES NO

Do you wish to allow the Executor to access the content (i.e., the substance of the communication) of any electronic communication in addition to the catalogue (i.e., identifying information) of the communication? YES NO

SPECIFIC GIFTS

Do you desire to give any specific gifts of money, real estate, or personal property items? If so, please detail below by identifying the gift and name and relationship of the person who will receive the gift.

1. _____
2. _____
3. _____

CARE OF MINOR CHILDREN AND THEIR NON-TRUST PROPERTY

YOUR FAMILY

Traditional families and extended or blended families require special estate planning considerations. Be prepared to discuss extended or blended family situations and treatment of children from previous marriages or relationships. If you leave your estate to your spouse, there are no guarantees or requirements that children from a previous marriage or relationship will receive an inheritance from you. Attach instructions or further information concerning your family if you do not feel your status is represented here, and check all boxes that best describe your family situation.

You are: Single Married Divorced Second or subsequent marriage
 You have: Children of your own Adopted children Stepchildren

Full Name (First Middle Last)	Age	Check appropriate boxes for each child
<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Child of this marriage
		<input type="checkbox"/> Child of previous relationship
<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Your child <input type="checkbox"/> Your step-child
		<input type="checkbox"/> Your spouse's child
<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Child of this marriage
		<input type="checkbox"/> Child of previous relationship
<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Your child <input type="checkbox"/> Your step-child
		<input type="checkbox"/> Your spouse's child
<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Child of this marriage
		<input type="checkbox"/> Child of previous relationship
<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Your child <input type="checkbox"/> Your step-child
		<input type="checkbox"/> Your spouse's child
<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Child of this marriage
		<input type="checkbox"/> Child of previous relationship
<input type="checkbox"/> Male <input type="checkbox"/> Female		<input type="checkbox"/> Your child <input type="checkbox"/> Your step-child
		<input type="checkbox"/> Your spouse's child

Concerning stepchildren:

- None of my children are stepchildren.
- For inheritance purposes, treat stepchildren as if they were my natural children.
- For inheritance purposes, do not treat stepchildren as if they were my natural children.
- Other: _____

Guardian of the Person: If your children are minors when you die, and the other natural parent is not alive or cannot act as guardian, a court may appoint person(s) you name to act as legal guardian(s) of the children. The Guardian of the Person will have physical control and custody of a child until age 18. If you are divorced at the time of your death the court will usually appoint the other natural parent to be Guardian even if you request someone else. You may still name a Guardian in case your former spouse dies before you or cannot act as Guardian for any reason. In some states the Guardian must be a resident of your state or be related to the child by blood (or the spouse of a blood relation). The guardian with whom the child lives is called the *guardian of the person*, and does not have to be the same person that manages the child's money or other property. If you have children from a previous relationship, be sure to disclose this information at your appointment with a lawyer.

Primary Physical Guardian of the Person:

- My spouse. (**Only if your current spouse if not the natural parent of the minor child**)
- Other. Complete the following:

Full name of person or couple (if co-guardians)	Relationship to you

Alternate Guardian of the Person: Identify the person to be the Guardian for your children if your Primary Guardian of the Person does not serve as Guardian.

Full name of person or couple (if co-guardians)	Relationship to you

Guardian of the Property: If your children are minors when you die and they inherit non-Trust property (tangible property, land, or money), a court will normally appoint the person you name to act as legal guardian of the children's property. The Guardian of the Property will have control and custody of the property until the children reach the age you select, up to age 21. If you have children from different relationships, be sure to describe the relationships on a separate piece of paper and submit with this questionnaire.

At what age do you want your children to receive property held by their Guardian?

18 19 20 21

Primary Guardian of the Property:

- My spouse. (**Only if your current spouse if not the natural parent of the minor child**)
- Other. Complete the following:

Full name of person or couple (if co-guardians)	Relationship to you

Alternate Guardian of the Property: Identify the person to be the Guardian for your children's property if your Primary Guardian of the Property does not serve as Guardian.

Full name of person or couple (if co-guardians)	Relationship to you

Guardians are often bonded or insured. The bond will be purchased and paid for with funds from your estate. Do you want your Guardians to be bonded or insured to protect your children?

YES NO

