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WILL PLANNING QUESTIONNAIRE

I. PERSONAL INFORMATION

Please give full legal names of all persons you name on this form.

A. Husband:

- (1) Name _____
- _____ (2) Birth Date _____
- _____ (3) Occupation _____
- _____ (4) Address and Phone _____
- _____ (5) Business Address and Phone _____

B. Wife:

- (1) Name _____
- (2) Birth Date _____
- _____ (3) Occupation _____
- _____ (4) Address and Phone _____
- _____ (5) Business Address and Phone _____
- _____

C. States Resided in other Than Texas (and Dates of Residence)

D. Date and Place of Marriage _____

E. Prior Marriage (s) if any _____

(1) How Terminated _____

(2) When terminated _____

(3) Where terminated _____

(4) Financial responsibilities _____

F. Family Members: Children, grandchildren, parents, etc. Put "PM" by names of children from prior marriage and "H" or "W" to indicate whether a prior marriage of husband or wife; e.g., "PM-W" means child of prior marriage of wife.

Name	Birth Date or Approximate Age	Relation
~~~~~		
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**G. Financial Advisors, if any**

(1) **Principal Bank** _____

(2) **Trust Officer** _____

(3) **Accountant** _____

(4) **Insurance Advisor** _____

(5) **Broker or Investment Advisor** _____

**H. Safe Deposit Box**

Location: _____

Person with Access: _____

**I. Other Personal Information** (or family characteristics you feel should be mentioned)

_____  
_____

**II. ESTATE PLANNING OBJECTIVES**

**A. Where would you want your property to go** (without regard to the impact of any estate and inheritance taxes) **if:**

(1) You die leaving spouse and descendants

_____  
_____  
_____

(2) You and your spouse die leaving descendants

_____  
_____

(3) You and your spouse die leaving no descendants

_____  
_____

**B. Whom would you want as executor:** (administrator trust, invest and manage assets, make distributions, etc.)?

1. _____
2. (Alternate) _____
3. (Alternate) _____

**C. Whom would you want as trustee, if any** (administrator trust, invest and manage assets, make distributions, etc.)?

1. _____
2. (Alternate) _____
3. (Alternate) _____

**TRUST AGE DISBURSEMENT:** _____

**D. If you and your spouse die leaving minor children, who would you want to be their guardian?**

1. _____
2. (Alternate) _____
3. (Alternate) _____

**E. Do you want powers of attorney (Durable or General) or (Medical) and who do you want to be the Attorney in fact or Agent?**

Name: _____  
Address: _____  
Phone Number: _____

Name: _____  
Address: _____  
Phone Number: _____

**F. Do you want a burial or cremation request in the Will: YES _____ NO _____**  
If burial, location of cemetery _____

**G. Do you want to be able to add a memorandum to your Will, if you later desire, to designate items to a beneficiary? YES _____**  
NO _____

**H. Do you have any specific bequests? If so, what item and who will get it?**

1. _____
2. _____
3. _____
4. _____
5. _____