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Will Intake Questions:

SECTION I

The first section of this questionnaire is information I need to write a will and powers of attorney for you.   The second section is questions, mostly financial, that will help you gather, in one place, information that your personal representative or attorney-in-fact will need.

Answers you give to questions in both sections are kept confidential by me, or to put it another way, whatever you tell me I do not tell to anyone. The only exception is that if I am working with spouses or partners I share information so that the three of us are equally informed.

A. GENERAL INFORMATION

1. Your full name.
2. Your cell phone number.
3. Street and mailing address.
4. Are you a U.S. citizen?
5. Have you ever made a will before?
6. Do you have a trust?
7. Are you married or in a committed relationship?
8. Spouse's/partner's full name.
9. Have you been married before? If yes, do you have a divorce decree that affects your retirement account or other property?
10. Full names and ages of biological or adopted children.

11. Are your parents living? If yes, what are their names and city and state where they live.

12. Names of siblings, and city and state in which they live.

B. AGENTS AND ATTORNEYS-IN-FACT

13. Who do you want to be your agent, called an attorney-in-fact, for your Durable Power of Attorney for Financial Matters? This is the person who will handle your financial affairs if you are alive, incapacitated, and unable to manage your financial affairs.

14. Who do you want to be the alternate agent for your Durable Power of Attorney for Financial Matters if your first choice is unable to serve?

15. Who do you want to be your agent, also called an attorney-in-fact, for your Durable Power of Attorney for Health Care decisions? This is the person who will make health care decisions for you if you are unable to make and communicate decisions.

16. Who do you want to be the alternate or back-up agent for your Durable Power of Attorney for Health Care if your first choice is unable to serve?

17. Name of person whom you want to be your personal representative (sometimes, also called an executor) for your will. The personal representative is the person who arranges for the transfer of property to those whom you designate in your will. They also are responsible for filing an income tax return for the portion of the year in which you last lived and, if applicable, for your estate.

18. Who do you want to be alternate or successor personal representative if your first choice is unable to serve?

19. Do you want your personal representative to be paid for his/her work? If yes, how much?

20. Do you want your personal representative to be reimbursed for out of pocket expenses he/she may incur while performing his/her duties?

21. Do you want your personal representative to post a bond? A bond is a type of insurance policy that the representative will act honestly.

C. END OF LIFE

22. Do you want a Living Will, also called an End of Life Directive?

23. Typically, a Living Will directs medical providers "to withhold or withdraw treatment that only prolongs the process of dying and is not necessary to my comfort or to alleviate pain." Some people prefer to list specific care or medical procedures that they would like to receive or to be withheld. What, if any, specific medical care or treatments would you like to be included in your Living Will?

24. Do you have any directions you would like to give regarding burial or cremation?

25. Do you have any directions you would like to give regarding your funeral?

D. CHILDREN

26. Who do you want to be the guardian of your minor children?

27. Who do you want to be the alternate for the guardian for your minor children, if your first choice cannot serve?

28. Who do you want to manage the money you give to your minor children?

29. Who do you want to be the alternate to manage the money you give to your minor children, if your first choice cannot serve?

30. Do you want to set up a trust for your minor children? If yes, at what age would you like them to inherit and have sole control of the money; 21, 25, 30, 35?

31. Do you want to set up a trust for your children over the age of eighteen but less than thirty years old?

32. Do you have any adult, disabled family member for whom you would like to set up a trust?

E. PROPERTY DISTRIBUTION

33. Please tell me how you want your property distributed, identifying to whom each gift goes. (Note question 34 below.)

34. Montana law allows you to make a list of personal property with designation of to whom you want the items to go. You can make changes to this list. You may not make handwritten changes to your will. The purpose of this law is to allow people to make gifts of sentimental items that they can later alter without going through the expense and formality of making a new will. Would you like to make such a list?

F. CHARITY

35. Do you want to make a gift to a charity or charities?

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Will Intake Questions:

SECTION II

This section is to help you create an inventory of your property and a list of important information. The purpose of this task is threefold. First, is to have in one place the information a person will need to handle your affairs. Second, some of your assets can pass outside your will depending on whether you have designated beneficiaries, but those assets are included in your estate for purposes of filing the necessary tax returns. Your personal representative needs to know about all of your property. Third, you may have questions about whether you want to gift property with attendant debt attached to it or have your estate pay off the debt and then give the property.

Please write answers on this questionnaire or create an excel spreadsheet with the sought-after information. With either method, please make sure at least 2 people know where to find this questionnaire or your spreadsheet.

G. GENERAL INFORMATION

36. Names and phone numbers of parents, siblings, and friends to be contacted.

37. If you have a safety deposit box, where is it located, and where is the key located?

38. If you have a private safe, how is it accessed?

39. Where do you keep your tax returns?

40. Name and phone number for your accountant.

41. Name and phone number for your financial advisor.

42. Where are the minor children's birth certificates, and what are their social security numbers?

43. What are your computer account passwords?

44. If you own a cemetery plot, what is the contact phone number/email for the person or company that manages the cemetery?

45. If you have adopted a child, where are the adoption papers?

H. REAL PROPERTY

46. If you own your home, is there a mortgage? If yes, what is the contact information for the mortgage company and what is the mortgage number?

47. Do you own any real estate other than the house in which you live? If yes, where is it located and identifying information for the mortgage company if there is a mortgage.

I. BUSINESS INTEREST

48. If you own or are a part owner of a business, what is the name, address and phone number of the business, and the name of a contact person at the business?

49. Where are the papers that document your ownership interest?

J. VEHICLES

50. For each vehicle you own, where is the title kept?

51. If there is a loan on the vehicle, what is the loan number and the contact information for the lender?

52. If you own any other motorized vehicles such as a boat, ATV, snowmobile, camper, where is the vehicle title kept? If there is a loan on the vehicle, what is the loan number and the loan company contact information?

K. PERSONAL PROPERTY WORTH MORE THAN $5,000

53. Do you own any item of property, that is not real estate, that has substantial value, such as jewelry, art, etc.?

    a.) For such property, what is it and where is it kept?

L. INSURANCE

54. For each policy of insurance, list the insurance company contact information and the policy number.

    a.) House,

    b.) Vehicle,

    c.) Life,

    d.) Medical,

    e.) Disability,

    f.) Long Term Care,

    g) Annuities

M. BANK ACCOUNTS

55. What is the contact information for the bank, and what are your bank account numbers?

56. Are your bank accounts joint accounts with right of survivorship?

57. Are your bank accounts pay on death accounts?

N. RETIREMENT ACCOUNTS

58. For each retirement account, list the account contact information, the account number, and the account beneficiary.

O. INVESTMENT ACCOUNTS

59. For each investment account, list the account contact information, the account number, and the account beneficiary.

P. OTHER INFORMATION

60. List here any other information you think your agent or personal representative should have.