

## WILL QUESTIONNAIRE

1.            \_\_\_\_\_  
Your Name                                      S.S.N.                                      Telephone  
  
                 \_\_\_\_\_  
Date of Birth
2.            \_\_\_\_\_  
If Married, Name of Spouse                      S.S.N.  
  
                 \_\_\_\_\_  
Spouse's Date of Birth
3.            \_\_\_\_\_  
Mailing Address
4.            \_\_\_\_\_  
City or County of Residence
5.            Names and ages of all children. Please list all children, whether now living or deceased,  
and indicate whether any are adopted or are children from a prior marriage, etc.
- \_\_\_\_\_                                      \_\_\_\_\_  
Name    Date of Birth
- \_\_\_\_\_                                      \_\_\_\_\_  
Name    Date of Birth
- \_\_\_\_\_                                      \_\_\_\_\_  
Name    Date of Birth
- (Continue with additional names on reverse side.)
6.            Do you own any real estate or personal property located outside Virginia?
7.            If married, have you during this marriage lived in Arizona, California, Idaho, Louisiana,  
New Mexico, Nevada, Texas, Washington, or Wisconsin?
8.            Do you have any trusts for yourself or other family members? Are you a party to any Buy-  
Sell Agreement, Stock Purchase Agreement or partnership? If so, please bring a copy of  
the trust or other document to our appointment.
9.            Please indicate approximate size of the estate (including life insurance, real estate,  
retirement plans, and all other assets).
10.           Please provide a summary of your assets on the attached sheets A and B. Indicate how  
property is owned (your name, spouse's name, or joint names), include cash value and face  
value of life insurance and beneficiary, and value of all assets taken into account in  
answering 9. above. You may substitute a recent financial statement for sheets A and B.  
If you have questions about any of your assets, such as the form of ownership or  
beneficiary designation, please bring in the relevant paperwork.
11.           Do you have living wills or powers of attorney?

SHEET "A"

Asset Summary

	<hr/>		
	Husband	Joint	Wife
	<hr/>		
Life Insurance			
<hr/>			
Residence			
<hr/>			
Other Real Property			
<hr/>			
Bank Accounts			
<hr/>			
Marketable Securities			
<hr/>			
Tangible Personal Property			
<hr/>			
Other Substantial Assets (Including Retirement Plan Accounts)			
<hr/>			
Subtotal:	\$ _____	\$ _____	\$ _____
Less Debts:	_____	_____	_____
Estimated Net Estate:	\$ _____	\$ _____	\$ _____

NOTES:

SHEET "B"

Life Insurance

<u>Company</u>	<u>Policy</u> <u>Number</u>	<u>Face</u> <u>Amount</u>	<u>Owner</u>	<u>Insured</u>	<u>Bene-</u> <u>ficiary</u>	<u>Annual</u> <u>Premium</u>	<u>Cash</u> <u>Surren-</u> <u>der</u> <u>Value</u>	<u>Type</u> <u>(group,</u> <u>term, whole</u> <u>life, etc.)</u>
----------------	--------------------------------	------------------------------	--------------	----------------	--------------------------------	---------------------------------	---	---