Website copy:

This DIY Will is perfect for those with assets to be passed on to loved ones when the person is no longer living. Without a Will, state law will determine who has ownership of your assets at death. If you are single, married, have a blended family and/or own any assets at all, it is necessary to prepare a Will. This questionnaire will guide you through the process of preparing your will online. Once you have completed the questionnaire, you will receive your Will in Word format for you to edit as you please. It is best to sign your Will IN THE PRESENCE of 2 witnesses (who are not named in the will) and IN THE PRESENCE of a notary who is not related to you and who is not named in the Will (mandatory in most states). Keep your original in a safe place and let at least one person know where it is. If you need further consultation, please contact our office.

**Quick Will and Trust Answer Set**

1. Family Information
   1. Full name
   2. Gender
   3. Address
   4. Marital status
   5. Date of marriage
   6. Spouse information
      1. Full name
      2. Address
      3. Gender
      4. Refer to
   7. Refer to spouse as:
      1. Husband
      2. Wife
      3. Life Partner
   8. Children (yes /no)
      1. Child Name
      2. Child Date of Birth
      3. Child Relationship
         1. Son
         2. Daughter
         3. Child to be disinherited? Yes/no
         4. Child's descendants also disinherited? Yes/no
2. Distribution Of My Property
   1. Residuary Estate [if spouse predeceases testator]
      1. Distribute My Residuary Estate to
         1. Descendants or
         2. Named Beneficiaries
      2. Descendants
         1. Common Trust for Minor Children Termination Age? \_\_\_\_\_\_

[When the youngest child attains the age you enter here the common trust will terminate.]

* + 1. Named Beneficiaries
       1. [REMOTE CONTIGENT BENEFICIARY]
          1. Name?
          2. Share [what percentage]
          3. Is this a charity? Yes/no
    2. Specific Distributions
       1. Name of Recipient \_\_\_\_\_\_
       2. Type of Recipient
          1. Individual
          2. Class of Individuals
          3. Charity
       3. Type of Gift
          1. Money
          2. Property
       4. Money
          1. $\_\_\_\_\_\_ [amount]
       5. Specific Property
          1. Type of Property

Real Estate

Tangible Personal Property, Securities or Cash

Other

* + - 1. Enter a description of the property to be distributed to the beneficiary. e.g., "my gun collection" (note the use of lower case 'm' in "my")
         1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [Enter a description of the property to be distributed to the beneficiary. The description you enter here will appear that way in the trust agreement.]

1. Designation and Succession of Fiduciaries
   1. INDEPENDENT EXECUTORS
      1. LIST INDEPENDENT EXECUTORS IN THE ORDER THEY ARE TO SERVE
      2. \_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_ etc.
   2. GUARDIANS
      1. LIST GUARDIANS IN THE ORDER THEY ARE TO SERVE
      2. \_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_ etc.
2. Powers of Fiduciaries
3. Administrative Provisions
4. Taxes, Claims and Expenses
5. General Provisions
6. Other Provisions
   1. Method for distributions to descendants: [choose one]
      1. Per stirpes
      2. By representation
      3. Per capita at each generation

[For the situation in which a beneficiary is deceased and property is to be distributed to the beneficiary's descendants, decide what method is to be used to divide the property among the beneficiary's descendants.

"Per Stirpes" - Whenever a distribution is to be made to a person's descendants per stirpes, the distribution will be divided into as many shares as there are then living children of the person and deceased children of the person who left then living descendants. Each then living child will receive one share and the share of each deceased child will be divided among the deceased child's then living descendants in the same manner.

"By Representation" - Whenever a distribution is to be made to a person's descendants by representation, the distribution will be divided into as many shares as there are, at that time, descendants in the nearest degree of kinship to the person and deceased descendants in the same degree who left then living descendants. Each then living descendant in the nearest degree will receive one share and the share of each deceased descendant in the same degree will be divided among his descendants in the same manner.

"Per Capita at Each Generation" - Whenever a distribution is to be made to a person's descendants per capita at each generation, the distribution will be divided into as many equal shares as there are, at that time, descendants in the nearest degree of kinship to the person and deceased descendants in the same degree who left then living descendants, each then living descendant in the nearest degree receiving one share. The remaining shares, if any, are combined and then divided in the same manner among the then living descendants of the deceased descendants as if the then living descendants who received a share, and their descendants, had predeceased the date of distribution.]

* 1. Deemed survivor in simultaneous death:

[If the testator and the spouse die in circumstances where the order of their deaths cannot be determined, who shall be deemed to have survived?]

* + 1. Testator or
    2. Spouse