

AccounTax MISSOURI WILL & TRUST QUESTIONNAIRE

(Standard Wills & Revocable Trust for Married Couple Without Minor Children)

Testators/Grantors (Persons Making The Wills & Trust)

Name of spouse: _____ Age: _____

Name of spouse: _____ Age: _____

Address: _____ State: _____ Zip: _____

Telephone: _____

Family Information

Number of Children: _____ Are more children anticipated in the future ? Yes _____ No _____

Full Name

Age

Do you have children from a prior marriage ? Yes _____ No _____

Does your spouse have children from a prior marriage ? Yes _____ No _____

(If Yes, please arrange for a personal appointment as the standard will is probably not appropriate)

Beneficiary & Distribution Information

Are there to be any specific bequests (gifts) of cash or personal property to someone other than your spouse or children? Yes _____ No _____

(If Yes, please arrange for a personal appointment as the standard will is probably not appropriate)

If no, how do you want the remainder of your property to be distributed ?

_____ Everything to the spouse and if the spouse has already died then everything to the children in equal shares. ***(This is the most common method)***

_____ Minimum allowed by law to spouse (disinheriting spouse to the extent permitted by law) and the balance to the children _____ or other beneficiaries _____.

(If none of the above, please arrange for a personal appointment as the standard will is not appropriate)

If a child dies before you, do you want their share to go to their children, if they have any ?

Yes _____ No _____ ***(Yes is the most common answer)***

If all of the standard beneficiaries (spouse and children) do not survive you, who do you wish to designate as alternate beneficiaries ?

_____ Standard distribution which is 50% to your family and 50% to your spouses family. Under state law, each half goes to the following living individuals in the following order: (1) Parents, (2) Brothers/Sisters, (3) Nieces/Nephews/Aunts/Uncles. ***(This is the most common method)***

_____ Other (Specify) _____

Personal Representative (Executor)

Who do you want to be the personal representative (executor) ? Your PR is responsible for administering your estate. Simply put, they will be responsible for liquidating your assets and distributing the proceeds to your designated beneficiaries. Although your PR does not have to be a Missouri resident, I recommend that you seriously consider how difficult it could be for someone far away to administer your estate.

___ The spouse and one or more successor personal representative (*This is the most common answer*)

___ The spouse and a co-personal representative

___ One personal representative and one or more successor personal representative

___ Two co-personal representatives.

First Choice: _____ (*Most common is Spouse*)

Successor Choice: _____

Next Successor: _____

Successor Trustees For Trust

Who do you want to be the trustee of your revocable trust after both of you die ? The trustee can be the same person as the personal representative if you want.

___ One trustee and one or more successor trustee. (*This is the most common answer*)

___ Two co-trustees and if one fails to qualify the other may act alone

First Choice: _____
Name and Address

Second Choice: _____
Name and Address

Distribution To Beneficiaries

If your spouse predeceases you, how old do you want your children to be before they receive their inheritance free from the trust ?

___ total distribution as soon as possible. (*This is the most common answer*)

___ total distribution at age _____.

___ 1/2 is to be released when 25 and the balance at age 30

___ 1/3 is to be released when 21, and 1/3 when 25 and the balance at age 30

___ Other: _____

Health Care Directive (Living Will)

Do you want a "living will" authorizing your spouse to withdraw medical treatment if you are terminally ill ? Yes ___ No ___

Do you want a second person named if your spouse has predeceased ? Yes ___ No ___

If yes, please give name of alternate person: _____

Durable Power of Attorney

Do you want a "Durable Power of Attorney" giving your spouse the ability to handle your financial affairs in the event you are mentally incapacitated ? Yes ___ No ___

Do you want a second person named if your spouse has predeceased ? Yes ___ No ___

If yes, please give name of alternate person: _____