

# AccounTax MISSOURI WILL & TRUST QUESTIONNAIRE

(Standard Will and Revocable Trust for Single Person Without Children)

## Testator & Grantor ( Person Making The Will & Trust )

Your Full Name: \_\_\_\_\_ Age: \_\_\_\_\_

Address: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: Day \_\_\_\_\_ Eve \_\_\_\_\_

## Family Information

Name of ex-spouse: \_\_\_\_\_ Divorced \_\_\_ Deceased \_\_\_ None \_\_\_

Is there any chance of children in the future ? Yes \_\_\_ No \_\_\_ Possibly Adopted \_\_\_

## Personal Representative ( Executor )

Who do you want to be the personal representative (executor) of your will? Your PR is responsible for administering your estate. Simply put, they will be responsible for liquidating your assets and distributing the proceeds to your Revocable Trust. 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.

\_\_\_\_\_ One personal representative and one or more successor personal representative  
*(This is the most common answer)*

\_\_\_\_\_ Two co-personal representatives.

First Choice: \_\_\_\_\_

Second Choice: \_\_\_\_\_

Third Choice: \_\_\_\_\_

Name and Relationship

## Successor Trustees

Who do you want to be the trustee of your Revocable Trust after you die or become incompetent ? It is very common to choose the same people who are the executors of your will.

\_\_\_\_\_ 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: \_\_\_\_\_

Second Choice: \_\_\_\_\_

Third Choice: \_\_\_\_\_

Name and Address

## Beneficiary & Distribution Information

How do you want your trust estate to be distributed ?

\_\_\_\_\_ Everything to the following individuals or organizations as follows:  
Percentage

Name & Address: \_\_\_\_\_ %

Name & Address: \_\_\_\_\_ %

Name & Address: \_\_\_\_\_ %

Name & Address: \_\_\_\_\_ %

\_\_\_\_\_ Other (Please Be Specific) \_\_\_\_\_  
\_\_\_\_\_

If a beneficiary dies before you and they have children, do you want their children to take their share ?  
Yes \_\_\_\_\_ No \_\_\_\_\_ N/A \_\_\_\_\_

If any beneficiaries (including children of beneficiaries if Yes is checked above) are minors, how old do you want them to be before they receive their inheritance free from the trust ? Please note that the trustee is allowed to distribute funds for education, medical and living expenses at any time prior to the distributions checked below.

- \_\_\_\_\_ total distribution at age: 18 21 25 30 \_\_\_\_\_ (Circle)
- \_\_\_\_\_ 25 but 1/2 is to be released when 21
- \_\_\_\_\_ 30 but 1/2 is to be released when 25
- \_\_\_\_\_ 30 but 1/3 is to be released when 21, and 1/3 when 25
- \_\_\_\_\_ Other: \_\_\_\_\_

If all of the beneficiaries do not survive you, who do you wish to designate as alternate beneficiaries ?

\_\_\_\_\_ Standard distribution under state law to the following living individuals in the following order:  
Parents; Brothers/Sisters; Nieces/Nephews/Aunts/Uncles. (***This is the most common method***)

\_\_\_\_\_ Other (Specify) \_\_\_\_\_

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

## Health Care Directive ( Living Will )

Do you want a "living will" authorizing someone to withdraw medical treatment if you are terminally ill ?  
Yes \_\_\_\_\_ No \_\_\_\_\_ If Yes, who ? 1<sup>st</sup>: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_

## Durable Power of Attorney

Do you want a "Durable Power of Attorney" giving a family member or friend the ability to handle your financial affairs in the event you are mentally incapacitated ? Yes \_\_\_\_\_ No \_\_\_\_\_ If Yes, who?

1<sup>st</sup>: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_