

# MISSOURI WILL QUESTIONNAIRE

(Standard Will for Single Person With No Children)

## Testator (Person Making The Will)

Your Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_

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

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_ Email: \_\_\_\_\_

## Family Information

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

Is there any chance of children in the future ? Possibly \_\_\_ Never \_\_\_

## Personal Representative (Executor)

Who do you want to be the personal representative (executor) ? Your Personal Representative 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 Personal Representative 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: \_\_\_\_\_

Address: \_\_\_\_\_

First Successor: \_\_\_\_\_

Address: \_\_\_\_\_

Second Successor: \_\_\_\_\_

Address: \_\_\_\_\_

## Health Care Directive (Living Will)

Do you want a "living will" authorizing one or more of your family or friends to withdraw medical treatment if you are terminally ill ? Yes \_\_\_ No \_\_\_

If Yes, Who ? First Choice: \_\_\_\_\_

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

It is common, but not required, to choose the same people as you did for your Personal Representative.

## Durable Power of Attorney For Financial Matters

Do you want a "Durable Power of Attorney" giving one or more of your family or friends the ability to handle your affairs if you are mentally incapacitated ? Yes \_\_\_\_ No \_\_\_\_

If Yes, Who ? First Choice: \_\_\_\_\_

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

It is common, but not required, to choose the same people as you did for your Personal Representative.

## Beneficiary & Distribution Information

Describe how your estate should be distributed.

\_\_\_\_\_ Standard distribution under state law to the following living individuals in the following order: (1) Parents, (2) Brothers & Sisters, (3) Aunts & Uncles, (4) Nieces & Nephews.

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

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## To Pay By Credit Card

Type of Credit Card: MasterCard \_\_\_\_ VISA \_\_\_\_

Credit Card Number: \_\_\_\_\_ Sec Code: \_\_\_\_/\_\_\_\_/\_\_\_\_

Expiration Date: Month \_\_\_\_\_ Year \_\_\_\_\_

Payment Amount: \$185.00 for Standard Will Package

Name on Card: \_\_\_\_\_

Signature: \_\_\_\_\_

**Mail or fax the completed form with check or credit card payment to:**

***Greg A. Launhardt***

11420 Gravois Road, St. Louis, Missouri 63126, Call (314) 842-1313, Fax (314) 842-7045

[greg@accountax-stl.com](mailto:greg@accountax-stl.com)

If your estate distribution is overly complex, I will call you with the revised fee before I prepare your will