

**JULIE EASON SMITH, P.A.**  
**SIMPLE ESTATE PLAN QUESTIONNAIRE**  
**MARRIED WITH CHILDREN**

Your legal name:

\_\_\_\_\_

Your spouse's legal name:

\_\_\_\_\_

Address:

\_\_\_\_\_

Are you both U.S. citizens and Florida residents:

\_\_\_\_\_

Full legal name and age of each child:

\_\_\_\_\_

\_\_\_\_\_

**Will provisions:**

Would you like to include any burial instructions in your Will, such as cremation, no viewing, place of burial, etc.? If so, please detail:

\_\_\_\_\_

\_\_\_\_\_

Personal property: Typically, clients like yourself leave all of their remaining items of personal property, including household goods, furniture, furnishings, clothing and jewelry, automobiles and boats, to their spouse, and then their children. Is this what you would like to do?

If not, please give alternate directions:

\_\_\_\_\_

\_\_\_\_\_

Residuary: All of your residuary estate, consisting of all assets that are in your name alone at the time of your death without beneficiary designation, including real estate, stocks, bonds, cash, etc., would typically be left to your spouse, and then your children. Is this what you would like to do?

If not, please give alternate directions:

\_\_\_\_\_

\_\_\_\_\_

Personal representative (executor): After naming your spouse as first choice for personal representative, who would you like to name as alternate?

\_\_\_\_\_

Guardian: Who would you like to care for your minor children if you and your spouse are unable to do so?

\_\_\_\_\_

Trustee: If your children are young, special needs, or adult age but may need financial oversight, who would you like to name as Trustee to oversee their inheritance from you? \_\_\_\_\_

\_\_\_\_\_

Trust distribution ages: What age(s) would you want them to take control of their money? 1/3 at age 22, 1/3 at age 25, 1/3 at age 28? \_\_\_\_\_ All at age 21? \_\_\_\_\_ All at age 25? \_\_\_\_\_ Other \_\_\_\_\_

\_\_\_\_\_

Are there any other special provisions that you would like to include, such as charitable bequests, etc? If so, please detail:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**THE FOLLOWING DOCUMENTS ARE RECOMMENDED AS PART OF GOOD ESTATE PLANNING:**

**Durable Power of Attorney:** The purpose of a durable power of attorney is to appoint someone to take care of you and your affairs during your lifetime in the event you become incapacitated or are otherwise unavailable to handle your own affairs. Typically, you would appoint your spouse as first choice, and one or two people as second alternates. Who would you like to appoint:

First choice:

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Second choice:

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**Living Will:** The purpose of a Living Will is to instruct your physician that, in the event you suffer a catastrophic illness or accident, with no possible chance of recovery, not to artificially prolong your life. You would typically appoint your spouse to make sure your instructions are implemented, and one or two people as alternates. Who would you like to appoint:

First choice:

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Second choice:

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Next scheduled appointment: \_\_\_\_\_ Who will retain original documents? \_\_\_\_\_