

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

Your legal name: _____

Address: _____

Are you a U.S. citizen and Florida resident: _____

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

If not, please give alternate directions: _____

Personal representative (executor): Who would you like to name as your 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 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, BASIC 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. Who would you like to appoint as your first choice, and who would you like to appoint as a second alternate.

First choice:

Second choice:

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. Who would you like to appoint to make sure your instructions are implemented, and please name one or two people as alternates. Who would you like to appoint:

First choice:

Second choice:
