

JULIE EASON SMITH, P.A.
SIMPLE ESTATE PLAN QUESTIONNAIRE
SINGLE WITH NO CHILDREN

Your legal name: _____

Address:

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

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 a family member or an alternate person or persons. Is this what you would like to do?

If not, please give alternate directions:

Name or names of alternate person? _____

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 a family member or an alternate person or persons, or charitable organization. How would you like to leave your residuary property? _____

Name or names of alternate person(s)? _____

Personal representative (executor): Who would you like to name as personal representative and who would you like to name as alternate?

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. Typically, you would appoint a family member or a friend, and one or two people as second alternates. Who would you like to appoint:

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. You would typically appoint a family member to make sure your instructions are implemented, and one or two people as alternates. Who would you like to appoint:

First choice:

Second choice:
