



WILL QUESTIONNAIRE

****NOTE: Please do your best to complete all required fields below. If you require additional space for any portion of the form, please use the space provided at the end. If you are uncertain of the answers to any of the fields below, please leave blank and submit the form as is. A member of the Entrust team will be in touch to discuss the matter with you further. Thank you****

PART 1: WILL INSTRUCTIONS FOR DISCUSSION				
Do you have an existing Will? (If yes please provide a copy)				
EXECUTOR(S):				
Please indicate if any person appointed as an executor is a US Resident.				
Executor(s) - Names	Address/Phone	Relationship	Appointment	
			<input type="checkbox"/>	Primary
			<input type="checkbox"/>	Alternate
			<input type="checkbox"/>	Joint with others named
			<input type="checkbox"/>	Primary
			<input type="checkbox"/>	Alternate
			<input type="checkbox"/>	Joint with others named
			<input type="checkbox"/>	Primary
			<input type="checkbox"/>	Alternate
			<input type="checkbox"/>	Joint with others named
			<input type="checkbox"/>	Primary
			<input type="checkbox"/>	Alternate
			<input type="checkbox"/>	Joint with others named

If you are appointing more than two executors acting together, do you wish that the majority be allowed to make decisions, even if one executor does not agree?		
GUARDIAN(S): If you have minor children		
Guardian(s)	Full Name	Relationship
Alternate(s)	Full Name	Relationship
PART 2: DISTRIBUTION		
PERSONAL EFFECTS (Example: jewelry, household items, furniture, automobiles, etc.)		
How and to whom would you like your personal effects distributed?		
Do you want to leave a particular personal item to anyone?		
If yes, please provide a description of the item(s) and the names and address of the recipient(s)		
Do you want to leave a particular asset such as real estate, shares of a family business or a club membership to a particular person?		

If yes, please provide details:	
CASH LEGACY	
Do you want to leave a cash gift to anyone?	
If yes, please provide details	
CHARITABLE GIFT	
Do you want to leave a charitable gift?	
If yes, please provide details	
RESIDUE	
This consists of the assets remaining in your Estate after payment of liabilities, taxes, specific gifts, legacies etc.	
Provision for Spouse	Please Check One:
1. Outright gift: My spouse or partner is to receive 100% of the residue of my estate if he or she survives me for 30 days.	
2. Spousal or partner trust: My executor is to invest my estate and pay my spouse or partner 100% of the net annual income produced by the residue of my estate during my spouse's or partner's lifetime.	
3. Other provision for Spouse or Partner (please describe)	

4.	None – please provide reason	
Provision for Children		Please Check One:
1.	<p>My estate is to be divided equally among all my children. If a child predeceases me, his or her share of my estate is to be divided equally among:</p> <p>_____ his/her children or</p> <p>_____ my other children</p>	
2.	<p>My estate is to be divided equally among all my children but they are not to receive their inheritance until the following age(s):</p> <p>_____ % at age _____</p> <p>_____ % at age _____</p> <p>the balance at age _____</p>	
	<p>If any of my children die before reaching the age that they receive the balance of the funds, the balance remaining shall be divided equally among:</p> <p>_____ his/her children or</p> <p>_____ my other children</p>	
3.	Other provision for Children (please describe	
4.	None – please provide reason	
Are all loans and advances made during your lifetime to any of your beneficiaries to be forgiven on your death?		

If not, please provide details of any debts owing to your estate

ALL ELSE FAILS

Who do you want to receive your estate if none of your primary intended beneficiaries (that is, spouse/partner, children, grandchildren) live to inherit?

Person or Charity	Relationship to you	Address	Percentage

PROVISIONS IF NO SPOUSE OR CHILDREN

If you do not have a spouse/partner or children or do not want to leave your estate to them, who do you want to receive your estate? Provide the following information for each such beneficiary:

Name	Relationship to you	Address	Percentage

FUNERAL WISHES

Funeral Wishes

Have you made any pre-paid funeral arrangements?

If so, please provide the funeral home name they are with

Any specific funeral wishes?

Space for Additional Information