

LAW OFFICE OF JAMES E. MISCAVAGE

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Attorney

James E. Miscavage

WILL PACKAGE QUESTIONNAIRE

Name _____ Name of Spouse _____

Address _____

City _____ County _____ State _____ Zip _____

Phone number _____ Spouse phone number _____

Email address _____ Spouse email _____

Age _____ Age of Spouse _____

Children or heirs (First Name, Middle Initial, Last Name, Age, Address)

1. _____

2. _____

3. _____

4. _____

Do you have any adopted children? Yes ___ No ___

Do you have any heirs with a disability? Yes ___ No ___

Do you have any children who have passed away? Yes ___ No ___

Do you own real estate? Yes _____ No _____ How is the real estate titled?

Address of 1st property _____

Address of 2nd property _____

Choice of Executor _____

Address _____

Phone No. _____

Choice of Contingent Executor _____

Address _____

Phone No. _____

Choice of Guardian of Children _____

Address _____

Phone No. _____ Relationship _____

Choice of Contingent Guardian of minor Children _____

Address _____

Phone No. _____ Relationship _____

Choice of Trustee of minor Children or Grandchildren's Assets _____

Address _____

Phone No. _____ Relationship _____

Choice of Contingent Trustee of minor Children or Grandchildren's Assets _____

Address _____

Phone No. _____ Relationship _____

What is your total estate including insurance, real estate and all bank, brokerage, 401(k) and IRA accounts valued at:

\$0 - \$1,000,000 _____

\$1,000,000 - \$3,000,000 _____

\$3,000,000 - \$6,000,000 _____

More than \$6,000,000 _____

Do you own an I.R.A., 401(k) or other tax deferred retirement plan? Yes _____ No _____

If yes, who are your beneficiaries for each account? _____

Do you have stock certificates not in a brokerage account? Yes___ No___

Do you own any property with a divorced spouse? Yes___ No ___

Do you wish to be cremated? Yes___ No___

Do you wish to disinherit a child, spouse or relative? Yes_____ No_____

If yes, who and why?

POWER OF ATTORNEY

Who would you want to be your agent on your power of attorney?

Agent _____

Phone No. _____ Relationship _____

Contingent Agent _____

Phone No. _____ Relationship _____

HOW DID YOU FIND THE ATTORNEY? _____

DOCUMENTS TO BRING TO YOUR CONSULTATION

Deed(s)

Prior Wills/ Powers of Attorney

Beneficiary designations on annuities/ insurance/ IRA's/ brokerage/ stockaccounts/ U.S.

Savings Bonds/ CD's

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