

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 (Home) _____ (Cell) _____

Email address _____

Age _____ Age of Spouse _____

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

1. _____

2. _____

3. _____

4. _____

Do you have any children who have passed away? Yes___ No___

Do you own real estate? Yes_____ No_____ Who is the real estate titled in?

Address _____

Address _____

Choice of Executor _____

Address _____

Cell Phone No. _____ Home Phone No. _____

Choice of Contingent Executor _____

Address _____

Cell Phone No. _____ Home Phone No. _____

Choice of Guardian of Children_____

Address_____

Cell Phone No._____ Home Phone No._____

Choice of Contingent Guardian of minor Children_____

Address_____

Cell Phone No._____ Home Phone No._____

Choice of Trustee of minor Children's Assets_____

Address_____

Cell Phone No._____ Home Phone No._____

Choice of Contingent Trustee of minor Children's Assets_____

Address_____

Cell Phone No._____ Home Phone No._____

Is your total estate including insurance, real estate and all personal property valued at more than:

\$0 - \$500,000 _____

\$500,000 - \$1,000,000 _____

\$1,000,000 - \$5,000,000 _____

\$5,000,000 - \$10,000,000 _____

*Note: Federal Estate Tax Exemption decreases on January 1, 2026 to \$6,000,000 per spouse.

Do you own an I.R.A., 401(k) or other tax deferred retirement plan? Yes_____ No_____

Did you designate a beneficiary on the retirement account? Yes_____ No_____

If yes, who are your beneficiaries?_____

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 the attorney to hold the original documents in his safe deposit box?

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_____

Cell Phone No._____ Home Phone No._____

Contingent Agent_____

Cell Phone No._____ Home Phone No._____

What gifting powers do you want to give to your agent?

HOW DID YOU FIND THE ATTORNEY?_____

PLEASE NOTE: Some entities, like Vanguard, will not accept any Power of Attorney. You either use their Power of Attorney form or you have no Power of Attorney with Vanguard. You will need to contact your investment entities in which you hold funds to determine if a Pennsylvania Power of Attorney is accepted to make transactions.

DOCUMENTS YOU MAY WISH TO BRING TO YOUR CONSULTATION

Deed(s)

Prior Will/ Power of Attorney

Beneficiary designations on accounts/ stocks/ U.S. Savings Bonds/ CD's/ insurance/
retirement accounts/ annuities

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