

**CLIENT INFORMATION AND BENEFICIARY QUESTIONNAIRE**

**WARNING! A BENEFICIARY DEED MUST BE RECORDED BEFORE YOUR DEATH TO BE VALID!!**

Name \_\_\_\_\_ Spouse: \_\_\_\_\_

Address \_\_\_\_\_

Preferred phone: \_\_\_\_\_ E-mail Address \_\_\_\_\_

**Legal Name(s) of ADDITIONAL Owner(s) of the property (currently on the deed):**

\_\_\_\_\_

**Legal Name(s) of the Beneficiaries:**

\_\_\_\_\_ % interest

\_\_\_\_\_ % interest

\_\_\_\_\_ % interest

\_\_\_\_\_ % interest

Are the Beneficiaries married: Yes \_\_\_\_\_ No \_\_\_\_\_

If Yes, will spouse appear on Deed: Yes \_\_\_\_\_ No \_\_\_\_\_

Spouse's Name to appear on Deed:

\_\_\_\_\_

\*Note, unless directed otherwise, the beneficial interest is obtained by Beneficiary and his/her spouse.

If a Beneficiary predeceases you, then (pick one):

1. \_\_\_\_\_ The interest of the Beneficiary that predeceased the owners shall revert back to the owner/s.

2. \_\_\_\_\_ The interest of the Beneficiary that predeceased the owner/s shall revert to the remaining Beneficiaries, equally.

3. Other \_\_\_\_\_

**Please be advised we do not conduct research on your property's legal description. We will use the last recorded legal description or the legal description you provide for the document we prepare.**

**COST OF SERVICES\*\*\$550 includes recording fee for all counties; If more than 15 minutes is required during the initial consultation, additional fees will be charged at attorney's hourly rate; if more than 1 hour is required to draft the deed and assist client with questions, then hourly services will be charged.**

\*Notary services not provided with fee.