

Beneficiary Questionnaire

Who Will Receive Which of Your Assets?

Spouse

Spouse _____

Maiden name _____

Date of marriage _____

Date of birth _____

Address _____

Current income \$ _____

Amount, specific items, or share of estate that you desire to leave

Alternate beneficiary _____

Children

Child _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave

Alternate beneficiary _____

Child _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave

Alternate beneficiary _____

Child _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Child _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Child _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Child _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Grandchildren

Grandchild _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Grandchild _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Grandchild _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Grandchild _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Parents

Parent _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Parent _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Siblings

Sibling _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Sibling _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Sibling _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Sibling _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Sibling _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Sibling _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Other Dependents

Other Dependent _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Other Dependent _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Other Dependent _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Other Dependent _____

Date of birth _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Are There Any Other Relatives, Friends, or Organizations to Whom You Wish to Leave Gifts?

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave

Alternate beneficiary _____

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave

Alternate beneficiary _____

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave

Alternate beneficiary _____

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave

Alternate beneficiary _____

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Amount, specific items, or share of estate that you desire to leave _____

Alternate beneficiary _____

**Are There Any Persons Whom You Wish
to Specifically Leave out of Your Will?**

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Reason for disinheritance _____

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Reason for disinheritance _____

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Reason for disinheritance _____

Name _____

Relationship _____

Address _____

Spouse's name (if any) _____

Reason for disinheritance _____