Kyla Gunter
Managing Partner

State Bar of Texas
Member

Texas Bar College
Member

kyla@gunterlawgroup.com

930 West 1st Street, Suite 200
Fort Worth, Texas 76102
Phone: (817) 310-5236
www.gunterlawgroup.com

Practicing in DFW &
Surrounding Areas

Oil and Gas Law
Wills, Trusts, &
Estate Planning
Probate Law
Real Property Law

info@gunterlawgroup.com

Simple Will Questionnaire (for Single Client)

The following information will help me advise you of your estate planning options and prepare your documents quickly and accurately. The more information you can provide, the more efficient the planning process will be. However, please do not spend too much time finding every single document or number before our meeting; any needed information or paperwork can also be obtained later.

Date: ________________________

1. Full name (as you will sign your Will): ____

2. Address: ____

   ____

   County: ______________________________

3. Contact Info:

   a. Phone 1: ______________________ Phone 2: ______________________

   b. Email: ____

4. Birthdate: ____________________________ US Citizen?: ___________________________

   Last 3 Digits ONLY of:

   a. Soc. Sec. No.: ______________ b. DL & State: _________________________

5. Marital History:

(a) Are you currently married? **Y / N**

Date & State of marriage: ____

Spouse Name: ____

(b) Are you Widowed? **Y / N**

Name of deceased spouse: ____

Date of death: ____________ County/State of Residence: ____________________

Did spouse leave a Will? **Y / N** **If yes, please include a copy of the Will.

Was it probated? **Y / N**

(c) Are you Divorced? **Y / N**

Name of ex-spouse: ____

Date & state of divorce: __________________ **Please include copy of Divorce Decree.

Financial obligation: ____

(d) Do you have any premarital or post-marital agreements in effect? **Y / N**

6. Children & Grandchildren (please include any who are deceased & use extra paper if needed):

(a) Child's Name DOB State of Residence

1. ____
2. ____
3. ____
4. ____

(b) Grandchild's Name DOB State of Residence Parent

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____

(c) Which descendants listed above are deceased?

____

7. Assets:

(a) Address Approx. Value Mortgage Balance

Residence: ____

Other: ____

Other: ____

(b) Savings/Checking/Brokerage Accounts (attach extra pages if necessary)

Acct Type Financial Institution Approx. Value or Balance

1. ____
2. ____
3. ____

(c) IRAs Institution / Custodian Balance Primary Beneficiary

1. ____
2. ____
3. ____

(d) Employee Benefit Plans (for defined contribution plans, like 401(k) plans, please use the current account balance. For defined benefit plans, please use either your projected monthly benefit or projected lump sum payment. For stock options, please use current value.)

Plan Type Institution/Administrator Balance Primary Beneficiary

1. ____
2. ____
3. ____

Yearly Contribution (for defined contribution plans):______________________________

(e) Life Insurance

Institution/Administrator	Cash Value	Payoff Amt	Primary Beneficiary

1. ____
2. ____
3. ____

(f) Trust Interests (including powers of appointment): ______________________________

____

____

(g) Other Major Assets (fine art, pending lawsuits, etc.): ____________________________

____

____

(h) Vehicles (including boats & trailers):

Make & Year	Owner on Title	Issuer State	Value	Loan

1. ____
2. ____
3. ____

8. Liabilities (excluding mortgages or car loans listed above)

1. Consumer Debts: ____

____

____

2. Business Debts: ____

____

____

9. Have you ever made any taxable gifts? (please include copies of gift tax returns you have filed)

Recipient	Amt.	Date	Source of Funds
1.			
2.			

10. Dispositive Plan

(a) Do you presently have a Will? **Y / N** (please include a copy)

(b) What are your estate planning objectives? (i.e., simplify probate, avoid income or estate taxes, provide for disabled relatives, make charitable gifts, set up trusts, etc.)

____

____

____

____

(c) In general, to whom and how do you want your estate to be distributed?

____

____

____

____

(d) Your Will will set up basic trusts for any minor children, grandchildren, or other relatives who might inherit under your Will. At what age should these trusts terminate and distribute the assets outright to them?

____

11. Fiduciaries

Your executor is responsible for probating your Will and distributing your assets to your beneficiaries. Married people often appoint their spouse as primary executor. Many banks and other institutions will serve as executor for a fee, but often it is best to appoint one of your heirs who is willing to serve for free.

If you have minor children, you should appoint a guardian to take care of them if both their parents die before they reach age 18 (you can also appoint a married couple as co-guardians). You must also appoint a trustee to manage any money the children inherit. The trustee and the guardian are frequently the same person; if you prefer to appoint different people to these posts, please make a note in the margin. If you wish to appoint more alternatives than the space below allows, please use additional sheets to indicate.

(a) Executor:

Name City & State Relationship

Primary: ____

1st Alt: ____

2nd Alt: ____

(b) Guardian and Trustee for Minor Children:

Name City & State Relationship

Primary: ____

1st Alt: ____

2nd Alt: ____

12. Family-Owned Business Information (if applicable)

Name ____

Address ____

Description ____

EIN (optional) ____

*****THIS QUESTIONNAIRE IS INTENDED FOR SIMPLE WILLS ONLY. IF YOU ARE INTERESTED IN ANY ADDITIONAL, SUPPLEMENTAL ESTATE PLANNING DOCUMENTS (i.e., POWERS OF ATTORNEY, MEDICAL DIRECTIVES, ETC.) WE WOULD LOVE TO DISCUSS THOSE OPTIONS WITH YOU, AS WELL, IF YOU ARE INTERESTED.*****