

# Beneficiary Questionnaire

<b>SPOUSE:</b>		Maiden Name:
Date of Marriage:		Date of Birth:
Address:		
Current Income \$	Amount, specific items, or share of estate which you desire to leave:	
Alternate Beneficiary:		
<b>CHILD:</b>		
Date of Birth:	Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:	
Alternate Beneficiary:		
<b>CHILD:</b>		
Date of Birth:	Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:	
Alternate Beneficiary:		
<b>CHILD:</b>		
Date of Birth:	Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:	
Alternate Beneficiary:		
<b>CHILD:</b>		
Date of Birth:	Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:	
Alternate Beneficiary:		
<b>CHILD:</b>		
Date of Birth:	Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:	
Alternate Beneficiary:		
<b>CHILD:</b>		
Date of Birth:	Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:	
Alternate Beneficiary:		
<b>GRANDCHILD:</b>		Date of Birth:
Address:		
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:	
Alternate Beneficiary:		

<b>GRANDCHILD:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>GRANDCHILD:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>GRANDCHILD:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>GRANDCHILD:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>GRANDCHILD:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>PARENT:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>PARENT:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>SIBLING:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:

Alternate Beneficiary:	
<b>SIBLING:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>SIBLING:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>SIBLING:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>OTHER DEPENDENT:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>OTHER DEPENDENT:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>OTHER DEPENDENT:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	

**Other Relatives, Friends, or Organizations that you wish to leave gifts**

<b>NAME:</b>	Date of Birth
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	

<b>NAME:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>NAME:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>NAME:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>NAME:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>NAME:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	

**Any Persons Whom You Wish to Specifically Leave Out of Your Will**

<b>NAME:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	
<b>NAME:</b>	Date of Birth:
Address:	
Spouse's Name (if any):	Amount, specific items, or share of estate which you desire to leave:
Alternate Beneficiary:	