

MISSOURI WILL & TRUST QUESTIONNAIRE

(Standard Wills & Joint Family Revocable Trust for Married Couple With Minor Children)

Please answer all questions. If you are unsure about the proper way to answer a question, please call me.

You and your spouse are not required to select the same individuals to be your executors, trustees or your children's guardians. However, if you are selecting different persons you will each need to complete a separate questionnaire.

Testators/Grantors (Persons Making The Wills & Trust)

Name of husband: _____ Birthdate: ____/____/____

Name of wife: _____ Birthdate: ____/____/____

Address: _____ State: _____ Zip: _____

Telephone: _____ Cell: _____ Email: _____

Family Information

Number of Children: _____ Are more children anticipated in the future ? Yes ____ No ____

Child's Full Name

Age

Do you or your spouse have children from a prior marriage ? Yes ____ No ____

(If Yes, please arrange for a personal appointment as the standard will is probably not appropriate)

Personal Representative (Executor)

Who do you want to be the personal representative (executor) ? Your PR is responsible for administering your estate. Simply put, they will be responsible for liquidating your assets and distributing the proceeds to your designated beneficiaries. Although your PR does not have to be a Missouri resident, I recommend that you seriously consider how difficult it could be for someone far away to administer your estate.

____ The spouse and one or more successor personal representatives (*This is the most common answer*)

____ The spouse and a co-personal representative. Your spouse may or may not like this option.

____ One personal representative and one or more successor personal representative. Usually children.

____ Two co-personal representatives. Can they work well together ?

First Choice: _____ (*Most common is Spouse*)

Address: _____

First Successor: _____

Address: _____

Second Successor: _____

Address: _____

Successor Trustees of the Joint Family Revocable Trust

Who do you want to be the successor trustee of your trust after both of you are deceased or incompetent ? The successor trustee is responsible for administering your Revocable Trust and distributing the assets to your designated beneficiaries. The Personal Representative and successor trustees do not have to be the same people however they frequently are.

_____ One trustee and one or more successor trustees. (*This is the most common answer*)

_____ Two co-trustees and if one fails to qualify the other may act alone. Can they work well together ?

First Successor: _____

Address _____

Second Successor: _____

Address _____

Guardian of Minor Children

If your spouse predeceases you and there are minor children, who would you like their guardian to be ?

First Choice: _____

First Successor: _____

Beneficiary & Distribution Information

Are there to be any specific bequests (gifts) of cash or personal property to someone other than your spouse or children? Yes _____ No _____
(*If Yes, please arrange for a personal appointment as the standard trust is probably not appropriate*)

If no, how do you want the remainder of your property to be distributed ?

_____ Everything to the spouse and if the spouse has already died then everything to the children in equal shares. (*This is the most common method*)

_____ Other _____
(*Please arrange for a personal appointment as the standard trust is not appropriate*)

If a child dies before you, do you want their share to go to their children (your grandchildren), if they have any ?
Yes _____ No _____ (*Yes is the most common answer*)

How old do you want your children to be before they receive their inheritance free from the trust ?
Please note that the trustee is allowed to distribute funds for education, medical and living expenses at any time prior to the distributions checked below.

_____ total distribution at age: 18 21 25 30 _____ (*Circle Your Choice*)

_____ 1/2 is to be released when 21 and the balance at age 25

_____ 1/2 is to be released when 25 and the balance at age 30

_____ 1/3 is to be released when 21, and 1/3 when 25 and the balance at age 30

_____ Other: _____

If all of the standard beneficiaries (spouse, children and grandchildren) do not survive you, who do you wish to designate as alternate beneficiaries ?

_____ Standard distribution which is 50% to your family and 50% to your spouses family. Under state law, each half goes to the following living individuals in the following order: (1) Parents, (2) Brothers/Sisters, (3) Nieces/Nephews/Aunts/Uncles. (*This is the most common method*)

_____ Other (Specify) _____

Health Care Directive (Living Will)

Do you want a "living will" authorizing your spouse to withdraw or determine your medical treatment if you are not capable of making your own medical decisions ? Yes ____ No ____

Do you want a second person named if your spouse has predeceased or cannot act? Yes ____ No ____

If yes, please give name and address of alternate person:

Name: _____

Address: _____

Durable Power of Attorney

Do you want a "Durable Power of Attorney" giving your spouse the ability to handle your affairs if you are mentally incapacitated ? Yes ____ No ____

Do you want a second person named if your spouse has predeceased or cannot act? Yes ____ No ____

If yes, please give name and address of alternate person:

Name: _____

Address: _____

If you want a third choice for any of the above please list here:

Name: _____

Address: _____



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Mail or fax the completed form with check or credit card payment to:

Greg A. Launhardt

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