

4. If you have any children from your **present** marriage, state the following: (LIST ALL CHILDREN)

<u>NAME</u>	<u>SON/DAUGHTER</u>	<u>DATE OF BIRTH</u>	<u>ADDRESS</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

5. If you have any children from a **prior** marriage and/or relationship, state the following: (LIST ALL CHILDREN)

<u>NAME</u>	<u>SON/DAUGHTER</u>	<u>DATE OF BIRTH</u>	<u>ADDRESS</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

6. If your children are under age 18, state the full name, address and relationship, if any, of the person you wish to act as their **Guardian** and or their **Trustee** in the event of your death if you are a single parent or, in the case of the joint death of you and your spouse, if you are married. You should obtain the consent of that person before executing your Will.

NOTE: A Guardian does not inherit any portion of your estate unless you so desire. If you are married, a Guardian will only be appointed under the terms of your Will if both yourself and your spouse are deceased.

6a. Guardian(s):

Guardian Name(s): _____
(Relationship if any)

Address: _____

Telephone#: _____

Successor Guardian(s)

Name(s): _____
(Relationship if any)

Address: _____

Telephone #: _____

6b. Trustee(s)

Trustee: Person who holds property for the benefit of another.

Trustee(s) Name(s): _____
(Relationship if any)

Address: _____

Telephone#: _____

Successor Trustee(s) Names(s): _____
(Relationship if any)

Address: _____

Telephone#: _____

7. Please give the following information:

7a. Real estate owned by you individually or with others. Please state how title is held (i.e., joint tenants with rights of survivorship, tenants in common, etc.):

<u>Address</u>	<u>How Title Held</u>	<u>Value</u>	<u>Mortgage</u>

7b. Approximate value of all assets (i.e., bank accounts, stocks, bonds, mutual funds, real estate, etc.) which you own **solely in your name**: _____

7c. Approximate value of all assets (i.e., bank accounts, stocks, bonds, mutual funds, real estate, etc.) which you **jointly own with another**: _____

7d. Approximate amount of life insurance on your life. Specify name of Company and Beneficiary. _____

7e. Are you the beneficiary under any trust document(s)? If so, please state the nature of the trust and attach a copy of the trust document. _____

8. What is the likelihood of a substantial inheritance in the near future? _____

9. 9a. Most married people provide that, upon their death, their property passes to the surviving spouse. If your spouse dies before you or you disinherit your spouse, you may elect: PLEASE CHECK NEXT TO NUMBER (1) OR (2), WHICHEVER OPTION YOU PREFER.

OR, if you are UNMARRIED WITH CHILDREN, upon your death, your property should pass: PLEASE CHECK NEXT TO NUMBER (1) OR (2), WHICHEVER OPTION YOU PREFER.

 1) That your property be divided in equal shares among all your then living children-OR

___2) That your property be divided equally among all your children, living or deceased.
The share of any deceased child will be distributed equally to his/her children.

Please check one of the following boxes:

- I wish my property to pass to my spouse and then my children as checked above.
- I wish my property to pass to my children as checked above.
- I do not wish to have my property pass to my spouse.
- I do not wish to have my property pass to my spouse or children.

9b. Distribution of Assets upon death: Specific Bequests: List any specific items that you wish to be distributed to a specific beneficiary.

Beneficiary	Relationship	Item

10. State the full name and address of the person you wish to serve as Executor of your estate. In the event the Executor you appoint declines or is unable to fulfill the position as Executor, please elect a successor Executor.

EXECUTOR/EXECUTRIX:

Name: _____

Address: _____

Telephone Number: _____

SUCCESSOR EXECUTOR/EXECUTRIX: (in the event named Executor(trix) is unwilling or unable to serve.)

Name: _____

Address: _____

Telephone Number: _____

11. Do you desire the Guardian, if any, and your Executor(trix) to serve without the necessity of obtaining a bond? _____

NOTE: Customarily, a Guardian and Executor(trix) serve without bond. If a Guardian or Executor(trix) serves with a bond, your estate will have to post the bond premium each year the bond is in effect.

12. If there is any additional information you feel would aid us in preparing your Will, please write in the space provided below or attach your separate notation.

13. Do you presently have a Will and/or Codicils to that Will? If you do, please attach a copy to your completed will questionnaire when it is returned to the office. _____

This Questionnaire should be returned to **PECK & TUNESKI, P.C., 10 PEARL STREET, P.O. BOX 37, NEW LONDON, CONNECTICUT 06320** or FAX 860-447-3150.

PLEASE VISIT OUR WEBSITE AT www.Peck-Tuneski.com for email transmission of a Will questionnaire.

I direct that no other relatives, persons or other entities shall be included in my Will other than those named herein.

I acknowledge that I have disclosed on this questionnaire all assets held solely in my name or joint with third parties.

Signature: _____

Date: _____