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UNCOMPLICATED WILL QUESTIONNAIRE

DATE: _____

NAME _____

ADDRESS _____

I. BENEFICIARY: Name & relationship and what should they receive?

II. BACKUP BENEFICIARY: Name & relationship of backup beneficiary if person in (I) above does not survive you.

III. GUARDIAN: If beneficiary is a minor(s), name and relationship of the person who will make a home for the children and be responsible for their upbringing.

IV. TRUSTEE: If beneficiary is a minor(s), name and relationship of the person who will oversee the trust. Also, please identify the age(s) for trust distribution.

V. BACKUP TRUSTEE: Name & relationship of backup trustee if person in (IV) above does not survive you.

VI. EXECUTOR: Name & relationship of person who will make sure WILL is followed.

VII. BACKUP EXECUTOR: Name & relationship of backup person who will make sure WILL is followed if person in (VI) above does not survive you.

