

Olivier Denier Long, Esq.

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Please complete and return this questionnaire as soon as possible.

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Check the boxes that apply:

- Prepare a reciprocal (mirror image) will for my spouse.
- Our aggregate gross estate (including spouse's estate and all life insurance) exceeds \$1,500,000.00.
- Please prepare a living will for me / for my spouse.
- Please prepare a durable power of attorney for me / for my spouse.

Estate Planning Questionnaire

1. Please provide:

Your full name:

Full name of your spouse or significant other:

Home Address:

Telephone number at work:

Telephone number at home:

E-mail Address:

How you were referred to Mr. Long:

(ARAG Group, Ceridean, Hyatt Legal Services, Legal Wise, Prudential Legal Services,

Other: _____).

(If you are a Hyatt Legal Services Plan member, please provide your social security number and authorization number.)

2. Your citizenship: United States, Other _____.

Your wife or significant other is a citizen of : United States, Other _____.

3. Names, birth dates, addresses and marital status of children, grandchildren and other relatives who will be mentioned in your Will:

4. How you plan to distribute your estate:

A. Cash bequests, if any: (For example, \$10,000.00 to Raymond F. Jones, who was such a loyal butler, chauffeur and valet.)

B. Bequests of personal property: (Watches, jewelry, heirlooms, art objects, etc., to individual people).

C. Distribution of balance of the estate:

All to Spouse or Significant Other.

All to my children in equal shares if my spouse or significant other predeceases me.

If a child who would otherwise receive something is not living, then that child's children receive equal portions of their deceased parent's share. (This is called per stirpes.)

D. As to A, B and C, please furnish an alternative beneficiary or beneficiaries, on the assumption that the first named person may predecease you:

E. Special instructions for funeral, burial, cremation, donation of your body to medical science, scattering of your ashes in a particular place, songs to be sung at the service, etc.

F. If you want a trust embodied in your will for the purpose of controlling when

beneficiaries receive money, at what age(s) should they receive the money?

5. The name and address of the person(s) whom you desire to appoint as personal representative(s) under your Will.
6. The name and address of the person(s) whom you desire to appoint as trustee(s) under your Will.
7. Name alternate personal representative(s) and trustee(s) to serve in case first-named person(s) should not be able or willing to serve.
8. The name and address of person or persons to be appointed guardian(s) for your minor children. Identify alternate guardian(s), if necessary:
9. Please furnish a copy of your present will, if you have one.
10. Estimated total value of your estate (assets minus liabilities), including life insurance.
11. Anything else?

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Questionnaire last updated 6/14/2004.
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