

T H E L A W O F F I C E S O F

**PAUL V. MOYER, P.L.**

A P R O F E S S I O N A L A S S O C I A T I O N

118 WEST ORANGE STREET, ALTAMONTE SPRINGS, FLORIDA 32714  
Telephone: 407.331.5505 Facsimile: 407.331.6308 Web: www.moyerlawyer.com

## SIMPLE WILL QUESTIONNAIRE

PLEASE **PRINT** ALL INFORMATION:

HOW WERE YOU REFERRED TO US/PLAN OR AUTH NUMBER: \_\_\_\_\_

FULL NAME: \_\_\_\_\_

SPOUSE'S FULL NAME: \_\_\_\_\_

ADDRESS AND PHONE: \_\_\_\_\_

If your spouse **is living** at the time of your death, do you want your spouse to receive all of your assets: Y / N

If your spouse **is not living** at the time of your death, do you want all of your assets to be divided among your children equally: Y/N

CHILDREN'S FULL NAMES	CITY OF RESIDENCE	AGE

If any of your children are minors (under 18), it is advisable that your list persons who are responsible for both their personal day to day care as well as their assets. If this is applicable to you, list the name of your first and second choice for this job:

1<sup>st</sup>. \_\_\_\_\_  
2<sup>nd</sup>. \_\_\_\_\_

At what age would you want your minor child to get funds if it is held in a trust (i.e., age 18, 21?) \_\_\_\_\_

DOES YOUR SPOUSE HAVE ANY CHILDREN THAT ARE NOT YOURS: Yes/No

DO YOU HAVE ANY CHILDREN THAT ARE NOT YOUR SPOUSE'S: Yes/No

If at the time of your death, one of your children has died before you but has children living of his or her own, do you want that deceased child's share to (circle one):

1. Go to that deceased child's children, in equal amounts
2. Be split among **your** then-living children, in equal amounts

"Personal representative" is Florida's term for "executor." His or her job is to get all the assets together, pay the bills, and distribute what is left according to your will. List the name of your first and second choice for this job:

1st: \_\_\_\_\_

2nd: \_\_\_\_\_

Do you have a Florida driver's license? Y / N

Does your spouse desire a will similar to yours? Y / N

If so, does your spouse have a Florida driver's license? Y / N

If you are also having Living Will prepared, who do you elect as your decision maker? (Please list your first and second choice. *Please note that if you are married, normally, the spouse is listed as your first choice.*)

1st: \_\_\_\_\_

2nd: \_\_\_\_\_

If you are also having a Durable Power of Attorney prepared, who do you elect as your decision maker? (Please list your first and second choice. *Please note that if you are married, normally, the spouse is listed as your first choice.*)

1st: \_\_\_\_\_

2nd: \_\_\_\_\_