

Katie Johnson PLLC

Attorney at Law
P.O. Box 136, 1101 W. Spruce
Beresford, SD 57004
605-763-8013
Katie.johnsonlaw@gmail.com

Here is the information I would need to draft a will for you. Please fill this out and mail this back to me and I will start a draft and return that to you.

ESTATE PLANNING INTAKE QUESTIONNAIRE

You and Your Significant Other

NAME(s): _____

MATTER: Estate Planning

Address: _____

Email: _____

Employer: _____

DOB: _____

SSN: _____

PHONE

Home: _____

Work: _____

Cell: _____

Other: _____

Are you legally married? Yes / No

If Yes, Date and Place of Marriage: _____

Beneficiaries and Children

How many children do you and your spouse have together? _____

Names and DOB? _____

Does either person have children from a prior relationship? _____
If yes, Names and DOB? _____

Beneficiaries _____ Relationship: _____ DOB ____/____/_____

Relationship: _____ DOB ____/____/_____

Relationship: _____ DOB ____/____/_____

Relationship: _____ DOB ____/____/_____

Relationship: _____ DOB ____/____/_____

**** If you have minor Children:
Who do you want to be their guardian? _____
Who do you want to manage any money you leave to them? _____
How old should they be before then inherit the bulk of the estate? _____

Administrative

Who should be your Personal Representative (the Executor of your will)?

(Name, Current City, State)
Alternate? _____ (Name, Current City, State)

Do you currently have any Powers of Attorney in Place? _____
If so, what types, and who has the POA? _____
Do you currently have a will or trust? _____ (if so, please bring a copy)

Assets

Real Estate Holdings (location, approx value, debt)

Investments / Securities (Stocks, Bonds, Mutual Funds, CD's)
Account type Held At Approx Value

Retirement Account (e.g. IRA, 401k, 403b, Pension) (Owner / Held at / Value / Beneficiary)

Life Insurance and Annuities
Company Type of Policy Person Insured? Beneficiary? Face amount?

Are you the Beneficiary of any trusts or pensions? _____

Personal Property / Special Gifts (e.g. Grandma's China, Dad's shotgun, Aunt's hope chest)

Special Goals: Do you have any charities or non-profits you would like to include in your will? _____

Any other special considerations? _____
