MANGRUM & MANGRUM, LLC

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Date:	
Client Name:	
Address:	County:
Telephone:	
E-Mail:	<u> </u>
(DECEMBAL CLIENTEC)	
(REFERRAL CLIENTS:)	
Referral Source:	
Case ID:	_
Member ID:	_
CONFIDENTIAL ESTATE PL	ANNING QUESTIONNAIRE
(THIS FORM IS NOT INTENDED FO	R TRUST-BASED ESTATE PLANS
	1111001 12 1012 120 12 1112 112 11 (0)
PERSONAL INFORMATION	
Client:	
NI	
Name: Date of birth:	
Total number of marriages (including the current marriage	۸.
Total number of marriages (including the current marriage	i)·
Spouse : (If you and your spouse wish to draft reciprocal Wills, lead please include your spouse's information below and return only one for	
Name:	
Date of birth:	
Total number of marriages (including the current marriage	e):
	/
Descendants, Relatives, & Beneficiaries: Full names, addresses, and ages for all immediate relative to you (please include: a) the name of the other parent name of any predeceased relatives, as/if applicable). If y related to you, please include the nature of their relation	if the child is not of the current marriage, and, b) the rou desire to leave property to a beneficiary who is not

ESTATE PLANNING CONSIDERATIONS

Beneficiaries & Specific Gifts: (If Applicable)

Full names and addresses of all beneficiaries who you plan to leave <u>specific</u> property in your Will. Indicate the category/class of property and any restrictions placed on the gift before the beneficiary is to receive it.

EXAMPLES:

- 1) I leave one of my vehicles to my Son, JOHN MANGRUM, if he does not own a vehicle upon my death; if he owns a vehicle, I leave one of my vehicles to my Daughter, SALLY MANGRUM; if I own more than one vehicle, my Executor shall have full discretion to determine which vehicle said beneficiary is to receive.
- <u>List a general category/class of property rather than specific items.</u> If you left your 2023 Chevy to your Son, owning a 2025 Ford at death, your Son would not get a car, despite your stated intent.
- 2) I leave my mother's engagement ring to my Son, JOHN MANGRUM of 4842 LaVista Road, if he is single when I die; if he is married or engaged, I leave said property outright to my Nephew, THOMAS MANGRUM of 456 Side Street.
- This is a better example of a specific gift because the ring is likely to remain estate property.

- You are free to place a condition or limitation on the gift, such as "provided he/she has grafrom college."	<u>iduated</u>
Distribution of Remainder of Estate: Excluding the specific gifts listed above, how do you wish for the remainder of your Estate to be distribution.	istributed?
Single Client: (If you are unmarried with children, please refer to the section below for guidance, but list your prefer	erences here.)
Married Client:	

If your spouse survives you?	
If your spouse does not survive you and min	nor children survive you (if applicable)?
If your spouse does not survive you and all o	children are adults (<i>if applicable</i>)?
If your spouse does not survive you and all odescendants (if applicable)?	descendants still living are grandchildren or more remot
If your spouse does not survive you and no	descendants survive you?
Executor Preferences:	
Executor:	State of Residence:
Alternate:	State of Residence:
Spouse's Executor Preferences: (If applical	ble)
Executor:	State of Residence:
Alternate:	State of Residence:

Guardian: (Applicable if your spouse predeceases you and minor children.)

Guardian of minor children: (If application)	ble) Guardian's state of residence:
	the age of majority or an attained the age upon which you feel they ial affairs, would you like to create a support trust? Y/N
If so, at what age do you want your be	eneficiaries to receive their trust property outright (free of trust)?
Any conditions placed before your ber office for advice if you select this option.)	neficiaries are to receive their trust property outright? (Please contact ou
Please designate a Trustee to manage t	the support trust:
Trustee:	State of Residence:
Alternate:	State of Residence:
POWERS OF ATTORNEY	
Advanced Healthcare Directive Would you like to appoint a healthcare	e agent to make healthcare decisions for you? Y/N
Financial Power of Attorney Would you like to appoint an agent to	make financial decisions for you? Y/N
(These are pre-printed, standard forms and u	will be completed in office upon execution of your Will.)

-END OF QUESTIONNAIRE-

THANK YOU FOR PLACING YOUR TRUST IN MANGRUM & MANGRUM!