



Planning



Questionnaire

If you and your spouse have different desires for your estate plan, please complete separate questionnaires.

I. Personal Information

Your Information

Full Legal Name _____ Date of Birth _____

Occupation _____ U.S. Citizen? Yes No SS No. _____

Address _____

City _____ State _____ Zip _____ Phone _____

County _____ Email _____

Married Single Widowed Separated Divorced

Spouse's Information

Full Legal Name _____ Date of Birth _____

Occupation _____ U.S. Citizen? Yes No SS No. _____

I would like to include a testimony of my Christian faith in my will:

Realizing the uncertainty of this life, I have FULL confidence and TRUST in my Savior Jesus Christ, in His death on the cross for my sins and in His shed blood as an atonement for my soul; and I know by faith that because of His sacrifice on the cross for me I HAVE ETERNAL LIFE!

Knowing the uncertainties of life, I hereby make a fitting and public witness of my Christian faith and am thankful to God for life and all He has graciously entrusted to me.

CHILDREN: *All children, including stepchildren, will be treated equally under your will and each child will receive equal distribution from your estate, **unless otherwise indicated**.*

1. Full Name _____ Birth Date _____

Address _____

If you are married: Child of both husband and wife Child of husband Child of wife

2. Full Name _____ Birth Date _____

Address _____

If you are married: Child of both husband and wife Child of husband Child of wife

3. Full Name _____ Birth Date _____

Address _____

If you are married: Child of both husband and wife Child of husband Child of wife

4. Full Name _____ Birth Date _____

Address _____

If you are married: Child of both husband and wife Child of husband Child of wife

5. Full Name _____ Birth Date _____

Address _____

If you are married: Child of both husband and wife Child of husband Child of wife

6. Full Name _____ Birth Date _____

Address _____

If you are married: Child of both husband and wife Child of husband Child of wife

DISABLED CHILDREN - Do any of your children have serious disabilities for which they receive government benefits, such as SSI or Medicaid? Yes No

If yes, please explain _____

DECEASED CHILDREN: List any deceased children below:

Child's Name	Date of Birth	Date of Death	Did your deceased child have any children?
_____	_____	_____	_____
_____	_____	_____	_____

II. Existing Plans

Your new will, once properly executed, revokes all previous wills.

Do you have an existing valid will? Yes No Spouse? Yes No

Do you have an existing valid trust? Yes No Spouse? Yes No

Have you signed any Powers of Attorney ? Yes No Spouse? Yes No

Do you have an existing living will? Yes No Spouse? Yes No

III. Your Estate Distribution

PERSONAL PROPERTY - includes jewelry, clothing, household furniture, appliances, furnishings, books, heirlooms, and similar items. Generally, personal property does NOT include your home or other real estate, cash, bank accounts, investment accounts, life insurance, or retirement accounts.

DISTRIBUTION OF YOUR PERSONAL PROPERTY – A form called “Personal Property Memorandum” will be included with your final documents. You can use this form to list personal items you want to be given to specific people after your death. You can change this form from time to time without the need to prepare a new will.

Mark ONE box below which coincides with your wishes in the distribution of personal property:

- To my spouse (if any), then by my list, items not on list to my children (if any) OR
- By my list, then to my spouse (if any), items not on list to my children (if any) OR
- To my children (if any), then by my list OR
- By my list, items not in my list to my children (if any) OR
- By my list

RESIDUAL ASSETS – The residual assets of your estate represent your money and property that is left over after payment of your last debts and expenses. Your residual assets do NOT include assets that transfer to others outside of your probate estate. Therefore, the residual assets generally do not include property held in “joint tenancy” or accounts with a “pay on death” beneficiary designation, like many bank accounts, retirement accounts, or life insurance policies.

DISTRIBUTION OF RESIDUAL ASSETS – Your residual assets will be distributed to your spouse (if any). If you are not married, or your spouse has predeceased you, your residual assets will be distributed to your designated charitable beneficiaries and children (if any), according to the terms below.

Check the boxes and complete the blanks below to confirm your desire to distribute your **residual assets** in the following ORDER:

1. To Spouse (if any):

First, distribute the balance of my estate to my spouse (if any), if my spouse survives me by 30 days, as follows:

Outright: Distribute the balance of my estate outright to my spouse.

2. To Ministry:

Next, distribute _____% (minimum of 10% must be designated for Assemblies of God churches/ministries) of my residual estate.

Ministry beneficiary _____ %

Address _____

Ministry beneficiary _____ %

Address _____

Ministry beneficiary _____ %

Address _____

3. To Children (if any):

Next, distribute the balance of my estate to my children (if any) or grandchildren (if my children predecease me), if my spouse (if any) does not survive me by 30 days as follows:

- Outright:** Distribute the balance of my estate outright to my children. (this option is NOT for minor children.

- Trust for children:** Rather than an outright distribution to my children, I would like a trust for the benefit of my children. The trustee will have the discretionary authority to pay income or principal to my children for their health, education and support. This trust is designed to protect my estate for my children and to distribute the remaining amount to my children when they are age 21 or at the ages specified below (check only one):
 - Complete distribution to children at age _____ OR
 - One-half (1/2) at age _____; One-half (1/2) at age _____; OR
 - One-third (1/3) at age _____; One-third (1/3) at age _____; One third (1/3) at age _____; OR
 - To be held indefinitely in trust for a child with a disability or other special needs

4. Final Distribution if No Living Spouse or Children:

In the event I have no living spouse, no living children, and no living grandchildren, and have not designated 100% of my estate to ministry, distribute the balance of my estate as follows:

- Ministry:** To ministries named previously in the percentages designated

- Other Family:** To my surviving family members in accordance with my state's intestate statutes. If I have no surviving family members, then to the ministries named previously in the percentages designated.

- Other Persons:** To the person or persons on an attached list, in the percentages designated on the list. If none of the persons on the attached list survive me, then to the Ministries named previously in the percentages designate.

OTHER INFORMATION

IV. Executor/Personal Representative

Your Executor/Personal Representative carries out your wishes as expressed in your will. If you nominate Co-Representatives, and one of them is unable to serve, the surviving Co-Representative will automatically serve as the sole representative, unless otherwise indicated in the "Other Information" section.

1) Primary Executor/Personal Representative:

Spouse or _____

Address: _____

Relationship _____

2) First Alternative Executor/Personal Representative _____

Address: _____

Relationship _____

3) Second Alternative Executor/Personal Representative _____

Address: _____

Relationship _____

V. Summary of Assets

Cash and Bank Accounts _____

Stocks, Bonds, Mutual Funds _____

Real Estate _____

Life Insurance _____

Retirement (IRA,401k, 403b, Keogh, etc.) _____

Miscellaneous Property _____
(tangible personal property, equipment,
Collections, furniture, vehicles, etc).

Closely-held Business Interests _____
(C-corp, S-corp, Partnerships,
Sole Proprietorship, LLC Interests)

TOTAL ASSETS _____

VI. Guardian of Minor Children

Your guardian is responsible for the care of your minor children. Your surviving spouse will be nominated as the primary guardian of your marital children. You will need to nominate alternate guardians in the event your spouse does not survive you. You may nominate individuals or married couples as guardians for your minor children. In most states, the probate court makes the final appointment, but you are allowed to nominate your preferred guardian. If you have minor children or plan on having children in the near future, you must complete this section.

1) First Alternate Guardian (s) _____

Address _____

Relationship _____

Upon the divorce of jointly nominated guardians, guardianship of my children should be:

Retained by one spouse, _____ (name spouse)

Passed to the next listed alternate

Upon the death of a jointly nominated guardian, guardianship of my children should be:

Retained by the surviving spouse

Passed to the next listed alternate

2) Second Alternate (s) _____

Address _____

Relationship _____

Upon the divorce of jointly nominated guardians, guardianship of my children should be

Retained by one spouse, _____ (name spouse)

Upon the death of a jointly nominated guardian, the surviving spouse should retain guardianship of my children unless I have indicated otherwise in the "other information" section below.

VII. Trustee (Complete only if you have selected a trust for children)

Your Trustee is the person charged with the duty of protecting and managing any assets held in trust for your. Accordingly, the Trustee should be a person or entity capable of providing a professional level of service. If you nominate Co-Trustees and one of them is unable to serve, the surviving Co-Trustee will automatically serve as the sole Trustee unless otherwise indicated in the "Other Information" section below.

1) Primary Trustee _____

Address _____

Relationship _____

2) Alternate Trustee _____

Address _____

Relationship _____

☐ TESTAMENTARY AGREEMENT ☐

(This program is not a substitute for the advice of an Attorney).

Southern Missouri District Council is not a law firm, and the employees and representatives are not acting as your attorney. As a complimentary service to Southern Missouri constituents, we have developed this Ministry to those constituents whose stewardship goals include gifts to ministry.

We do not practice law, and the legal information contained in this program is not legal advice, and not to be acted upon as such. This ministry extends only to the preparation of will documents created solely from the information you have provided us on this Application. It does not extend to the execution or signing of the will documents created for you.

We do not represent or warrant that the information provided by this program is, or will always be accurate, complete or up-to-date. Any representation or warranty that might be otherwise implied is expressly disclaimed. The law is different from jurisdiction to jurisdiction, and is also subject to interpretation by different courts. The law is a personal matter, and no general information or legal documents like the kind this ministry provides can fit every circumstance. **Therefore, if you need legal advice for your specific concerns, or if your circumstances are too complex to be addressed by our ministry, you should consult a licensed attorney in your area.**

_____ (initial) I agree to leave at least 10% of my estate assets after death (or if
married,
after the death of both spouses) to an Assemblies of God ministry.

I have read and understand this document, and agree to the terms and conditions set forth above.

Date: _____

Printed Name: _____

Date: _____

Printed Name: _____