

L A W   O F F I C E S   O F  
**DAVID A. ARIETTA**

700 YGNACIO VALLEY ROAD, SUITE 200  
WALNUT CREEK, CALIFORNIA 94596

TELEPHONE: (925) 472 - 8000  
FACSIMILE: (925) 472 - 5925  
E-MAIL: David@Ariettalaw.com

## **WILL QUESTIONNAIRE**

Please fill out this questionnaire in preparation for our meeting.

I. Family Information

Full name: \_\_\_\_\_

Any other names used: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone number: \_\_\_\_\_

If applicable:

Spouse's full name: \_\_\_\_\_

Other names used by spouse: \_\_\_\_\_

Children's full names (if applicable)

Birth Date

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Are there any deceased children? YES / NO

If yes, Full Name of Deceased Child/ren: \_\_\_\_\_

Full names of brothers and sisters still living (if you have no children):

(Your brothers/sisters)

(Spouse's brothers/sisters)

---

---

---

---

---

---

Full names of parents still living (if you have no children):

(Your parents)

(Spouse's parents)

---

---

---

---

II Marital History

Were you previously married? YES / NO

If applicable, was your spouse previously married? YES/NO

If divorced, name of spouse:

date of divorce decree:

---

---

If widowed, name of spouse:

date of death:

---

---

III Estate Planning Documents

Do you have any of the following estate planning documents:

Will: YES / NO

Trust: YES / NO

Power of Attorney for Financial Management: YES / NO

Power of Attorney for Health Care: YES / NO

IV Distribution of Your Estate

How should your personal property (furniture, appliances, furnishings, pictures, china, glass, books, vehicles, etc.) be distributed?

---

---

---

Do you want to give any specific devises to any person(s) (cash, stock, etc.)?

---

---

How should the remaining property in your estate be distributed?

---

---

Do you wish to specifically disinherit any person(s)? If so, please identify who and explain your reasons:

---

---

Name, Address and Telephone number of executor:

---

Name, Address and Telephone number of alternate executor:

---

Name(s) of guardian(s) for your minor child/ren (if applicable):

---

Name of alternate guardian(s):

---