

10. Do you want your spouse to receive your property outright or in trust? _____ If in trust, with what restrictions?

11. Do you want your children to receive your property outright or in trust? _____ As of what age?
With what restrictions?
If you have established trusts for these children, do you want the trustee to encroach on capital for: college, marriage, starting a business, illness, comfort and support, before your children reach the age to receive property outright?
12. Are there any other persons (parents, siblings and family, grandchildren) for whom you wish to provide?

13. To Whom do you want the residue of your estate (this may be the largest portion) to go?
If predeceased, then to Whom?
Outright or in trust?
14. If you are establishing trusts, who do you want to be the trustee?
If two, may one act alone? ____ If two and one dies or resigns, may the other continue alone?
Successor trustee (s)
15. If you have young children, who is to be their guardian if you and your spouse dies? _____
16. Who is to be your executor?
If two, may one act alone?
Successor Executors
17. Your "Unified credit" will protect from estate tax your life- time gifts (not counting gifts of \$10,000.00 per year per donee) and your bequests by will totaling \$600,000.00. Will your gifts and estate go beyond this amount?
18. Do you know of any powers of appointment you may have under someone else's will or trust?
If you wish to exercise such a power, how?
19. Is there anything else you think we should know in drafting your will?

Signature

Date

(Form 1001)

- 2 -