

**VETERANS WILLS FOR HEROES
QUESTIONNAIRE**

I. PERSONAL INFORMATION

a. Full Legal Name

b. Current Residential Address

Street _____

City _____ State _____ Zip _____

c. Parish of Residence _____

d. Date of birth _____

e. Gender _____

II. MARITAL STATUS (select the most appropriate)

_____ Married once, and my spouse is alive.

_____ Presently married, and had a prior marriage.

_____ Widow(er).

_____ Divorced, not presently married.

_____ Single, never married.

_____ Other.

Full legal name of your spouse or partner: _____

Is your spouse/partner a U.S. citizen? _____ Yes _____ No

Is your spouse/partner's address the same as listed above?

_____ Yes _____ No

If no, spouse/partner's current address:

Street _____

City _____ State _____ Zip _____

III. CHILDREN

a. Do you have any children? _____ Yes _____ No

Please list your children's names, dates of birth, and whether they are biological or adopted.

	<u>Name</u>	<u>Birthdate</u>	<u>Biological/Adopted</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____

*The above list should not include step-children, if any, unless they have been adopted. If you wish to provide for step-children, they can be listed in the distribution articles.

b. Do you now have minor children, or expect to have additional children by birth or adoption? _____ Yes _____ No

i. If you now have minor children, is the other parent of the minor child(ren) alive? _____ Yes _____ No

ii. The other parent of the minor child(ren) is:
_____ My Spouse _____ Another Person

iii. If the other parent of the minor child(ren) is another person, list below:

	<u>Child Name</u>	<u>Other Parent</u>
1.	_____	_____
2.	_____	_____

Upon your death, your spouse will hold usufruct (uses and fruits) of the community property you acquired together. This usufruct can last for life or until remarriage. Would you elect for your spouse to hold the usufruct for

_____ Life
_____ Until Remarriage

IV. EXECUTOR

You may choose any competent adult to serve as the Executor of your estate, however you should consider who is the most qualified and has the best temperament to handle the legal, financial and administrative responsibilities of serving as an Executor.

Your Executor will be responsible for settling your estate upon your death. Responsibilities include petitioning a court for letters of appointment, settling creditor claims, finding and distributing assets, and filing any necessary tax returns. Your Executor will owe a duty, not only to your beneficiaries, but also to any creditors of your estate.

It is common for a person to choose their spouse, a close relative or friend as the Executor.

a. Executor Name _____

i. Do you wish your Executor to be independent? _____ Yes _____ No
(This means your Executor will have the freedom to handle your estate without first obtaining court approval.)

b. Would you like to appoint a successor Executor if the above-named Executor is unable or unwilling to serve? _____ Yes _____ No

i. If yes, list the name of your Successor Executor

V. TUTORSHIP *(Skip this section unless you have, or plan to have minor children)*

If your children are minors (under age 18) when you die, and if the other natural or adopted parent is not alive or is unable to act as Tutor, the Court may appoint the person you name to act as legal Tutor of your minor children. The individual(s) named will have physical control and custody of the children until they reach age 18.

If you have sole custody, the child's other natural or adopted parent will presumptively act as parent even if you provide for someone else to serve as Tutor in your will. You should still name a Tutor, however, in case the child's other natural or adopted parent dies before you, is unwilling or unable to act as parent, cannot be located, or for any reason, can not act as Tutor.

a. Tutor Name _____

b. Successor Tutor Name *(optional)* _____

VI. TRUST

You have the option to create a spendthrift trust for your beneficiaries. A spendthrift trust gives an independent trustee the full authority to make decisions as to how the trust fund may be spent for the benefit of the beneficiary.

- a. Would you like to establish a spendthrift trust? Yes No

- b. Name of Trustee _____

- c. Discretion for distributions (please select one):
 Unlimited
 Limited to support, maintenance, education or medical expenses

- d. Termination of trust (please select one):
 Upon beneficiary's _____ birthday
 For life

VII. LEGACY INFORMATION

- a. To whom would you like to leave your tangible personal property? (i.e. household goods and furnishing, personal effects, etc.)

A particular legacy is a statement in your will that a certain asset or specific amount of money will be given to the beneficiary(ies). You may make specific gifts of cash, real estate, or tangible personal property to specific people or charities within your will. If you make specific bequests, only give property or amounts of cash that you are reasonably sure you will have when you die. If you make no specific bequests, all of your property will pass to your primary beneficiaries.

- b. Do you wish you make any specific particular legacy in your will?
 Yes No

If yes, please list the specific bequests below:

Beneficiary Name	Description

- c. Would you like to leave your share of your spouse's retirement and insurance benefits to your spouse? (*Note: this only affects the portion to which you are entitled under Louisiana's community property laws, this does NOT affect the named beneficiaries under a particular policy.*)

_____ Yes _____ No

VIII. RESIDUARY INFORMATION

How do you wish to distribute the remainder of your estate? Your residuary estate is whatever property remains after paying debts and expenses of administration, and any specific bequests. Because many people do not make specific bequests, the “residuary” usually describes all the property left to your primary beneficiaries. Please select and complete one of the following:

_____ Single Legatee

Name _____

Alternate _____

_____ Multiple legatees in percentages

Beneficiary Name	Percentage

_____ To my descendants to be shared equally

IX. CONTINGENT RESIDUARY INFORMATION

Your contingent beneficiary is also referred to as the “second beneficiary,” in some cases. This individual will be considered the primary beneficiary if the original beneficiary predeceases you. Naming a contingent beneficiary is important to allocate your estate if you and your primary beneficiaries pass away unexpectedly. Please select and complete one of the following:

_____ Single Legatee

Name _____

Alternate _____

_____ Multiple legatees in percentages

Beneficiary Name	Percentage