

MULLINS LAW FIRM, P.A.

WILL PREPARATION INTERVIEW FORM

Please answer each and every question. If a question does not apply to you, please indicate by inserting a "N/A" in response to the question. If additional space is necessary to fully answer a question, please continue on the additional space provided. Thank you. ***Please be advised: We DO NOT set up Trusts as part of our affordable Flat Fee Family Probate Services. If you want a Trust for any of your beneficiaries, we need to refer you to a specialist to make sure you receive the best of care. Elder Law, Estate Planning, and Estate Tax Advice are also referred out to the same specialists.***

BACKGROUND INFORMATION

Name (Full, Legal): _____

Address: _____

City, State and Postal Code: _____

Home Phone Number: () _____ Cell Phone Number: () _____

Work Phone Number: () _____ Email address: _____

Spouse's Name (Full, Legal): _____

Address: _____

City, State and Postal Code: _____

Home Phone Number: () _____ Cell Phone Number: () _____

Work Phone Number: () _____ Email address: _____

Names and City/State of residence of children from current marriage:

Names and City/State of residence of children from prior marriage(s):

Names and City/State of residence of *Spouse's* children from prior marriage(s):



Do you own real property in any State? Y N

Location:

If yes, is the property owned jointly with the rights of survivorship to any co-owners? Y N

Do you or your spouse have a trust(s)? Y N

Explain:

Name, Phone Number, and City/State of Residence of the person **you** wish to be the **Personal Representative** of your Estate:

Name, Phone Number, and City/State of residence of the person **you** wish to be the **Alternate Personal Representative** of your Estate, in the event your first choice is unable or unwilling to take on that duty:

Name, Phone Number, and City/State of Residence of the person **YOUR SPOUSE** wishes to be the **Personal Representative** of his/her Estate:

Name, Phone Number, and City/State of residence of the person **YOUR SPOUSE** wishes to be the **Alternate Personal Representative** of his/her Estate, in the event the first choice is unable or unwilling to take on that duty:

If you/your spouse have special instructions you wish to include in your Wills, please list those below.

