



Syndicate Subscription Legal Plans

LAST WILL & TESTAMENT **CLIENT INTAKE QUESTIONNAIRE:**

A WILL MUST BE SIGNED CORRECTLY TO WORK. In most states it must be signed in front of two witnesses who are not beneficiaries. If you have no will, state law decides who inherits — which may not be who you would choose. A will alone does NOT avoid probate.

CONFIDENTIAL. A will states who receives your property, who manages your estate (your executor), and who you nominate as guardian for your minor children. This questionnaire gathers what we need to prepare it, and helps us tell you whether a trust would serve you better. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT(s):

☐ Client 1 (Testator): _____

☐ Client 2 (spouse / partner, if preparing wills together): _____

Mailing Address: _____

City: _____ County: _____ State: _____ Zip: _____

Syndicate Plan Member ID: _____ Plan Start Date: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — WHAT YOU NEED

1.1 Check all that apply:

☐ A new will

☐ Update or replace an existing will

☐ Mirror wills for a couple

☐ Pour-over will (I have or want a trust)

☐ Guardian nomination for minor children

☐ Also interested in a living trust *

☐ Powers of attorney & health care directive *

☐ Storage of my original will

** Please also complete our Estate Planning, Trusts, Power of Attorney, or Advance Health Care Directive Intake Forms as applicable.*

1.2 What are your main goals or concerns? _____

PART 2 — YOU & YOUR FAMILY

2A Client 1:

Full Legal Name: _____ Date of Birth: _____

Other names used: _____ Citizenship: _____

Phone: _____ Email: _____

Occupation: _____



Syndicate Subscription Legal Plans

2B Client 2:

Full Legal Name: _____ Date of Birth: _____

Other names used: _____ Citizenship: _____

Phone: _____ Email: _____

Occupation: _____

2.1 Marital status:

☐ Single ☐ Married ☐ Registered domestic partners
☐ Divorced ☐ Widowed ☐ Separated

Date and state of marriage / registration: _____

2.2 Have you been married before? ☐ Yes ☐ No

2.3 Any prenuptial, postnuptial, or divorce agreement affecting property? ☐ Yes ☐ No

2.4 Children (living and deceased, including from prior relationships and stepchildren):

Name	Date of Birth	Child Of (1, 2, Both)	Minor?	Special Needs / Concerns?

2.5 Do any children have children of their own? ☐ Yes ☐ No

2.6 Is anyone else financially dependent on you? ☐ Yes ☐ No

If yes, explain: _____



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PART 3 — YOUR PROPERTY

A will controls only property in your name alone. Jointly owned property and accounts with named beneficiaries pass outside your will.

Asset	How Titled	Est. Value \$	Beneficiary Named?
Home / real estate			
Real estate in another state			
Bank accounts			
Investment accounts			
Retirement accounts			
Life insurance			
Business interests			
Vehicles			
Valuables / collectibles			
Digital assets / cryptocurrency			

3.1 Approximate total estate value: \$ _____ Total debts: \$ _____

PART 4 — WHO RECEIVES YOUR PROPERTY

4.1 General plan:

- ☐ Everything to my spouse / partner, then to my children equally
- ☐ Everything to my children equally
- ☐ Unequal shares (explain below)
- ☐ Includes grandchildren or other relatives
- ☐ Includes charities
- ☐ Not sure — need advice

4.2 Explain your wishes: _____

4.3 Specific Gifts (particular items or amounts to particular people):

Item / Amount	Recipient	Relationship	If That Person Dies First



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4.4 For beneficiaries under a certain age, property should be:

- ☐ Outright when I die
☐ Held in trust until a set age
☐ Staggered (e.g., 1/3 at 25, 30, 35)

Ages: _____

4.5 Do you want to leave nothing to a child or relative? ☐ Yes ☐ No

Who, and (optional) why: _____

4.6 If all of your named beneficiaries die before you, who should inherit? _____

4.7 Do you want a no-contest clause (discouraging challenges to the will)? ☐ Yes ☐ No

PART 5 — EXECUTOR, GUARDIAN & PETS

Role	Name & Relationship	Phone / City
Executor (personal representative)		
Alternate executor		
Guardian of minor children		
Alternate guardian		
Caretaker for pets		

5.1 Have these people agreed to serve? ☐ Yes ☐ No

5.2 Should the executor serve without posting a bond? ☐ Yes ☐ No

5.3 Is there anyone who should NOT serve as executor or guardian? ☐ Yes ☐ No

If yes, explain: _____

5.4 Money set aside for pet care: \$ _____ Instructions: _____

PART 6 — FINAL WISHES & EXISTING DOCUMENTS

6.1 Final arrangements:

☐ Burial ☐ Cremation ☐ Donation to science ☐ No preference

6.2 Funeral, religious, or memorial wishes (a will is often read after the funeral — tell your family too): _____

6.3 Existing documents:

☐ Prior will ☐ Living trust ☐ Power of attorney
☐ Advance health care directive ☐ None

Date signed / prepared by: _____ Location of original: _____

6.4 Should all prior wills and codicils be revoked? ☐ Yes ☐ No

6.5 Do you own property in another state or country? ☐ Yes ☐ No



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Property in another state may require a separate probate there; a trust can often avoid that.

PART 7 — SIGNING

We will meet with each client privately to confirm the decisions are their own, and will arrange witnesses who are not beneficiaries.

- 7.1 Can you sign in person with two witnesses? ☐ Yes ☐ No
- 7.2 Do you need a home, hospital, or care facility signing? ☐ Yes ☐ No
- 7.3 Do you need documents in another language or read aloud to you? ☐ Yes ☐ No
- 7.4 Is anyone pressuring you about the contents of your will? ☐ Yes ☐ No
- 7.5 Would you like Syndicate to store your original will? ☐ Yes ☐ No

PART 8 — DOCUMENT CHECKLIST

Please provide copies of the following, if available. Check each item you are including.

- | | |
|--|--|
| ☐ Existing will / codicils | ☐ Trust documents |
| ☐ Deeds to real estate | ☐ Recent account statements |
| ☐ Life insurance & retirement beneficiary forms | ☐ Business documents |
| ☐ Prenuptial / postnuptial agreement | ☐ Divorce judgment |
| ☐ List of specific gifts | ☐ Photo ID |

Certification:

I/We declare that the information provided in this questionnaire is true, correct, and complete to the best of my/our knowledge, and that it reflects my/our own wishes, made freely and without pressure from anyone. I/We understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of preparing my/our will.

Signed and dated this ____ day of _____, 20__

Signature (Client 1): _____

Print Name: _____

Signature (Client 2): _____

Print Name: _____

Please Print and Email to STEVE@STEVEMUELLERLEGAL.COM, or
save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.