



Will Questionnaire Overview

Hosted by your LegalShield
Independent Associate

Will Fact:

Over 54% of survey participants do not have a Will.

This LegalShield study was conducted on August 10, 2022. LegalShield surveyed 1,318 adults, 18 and older, who live in the U.S. The sample was balanced by age and other demographic variables according to the U.S. Census.



Perceptions About Wills:

“I don’t need it if I want everything to go to my kids.”

“My family members will take my kids.”

“I don’t have anything.”

“It’s too expensive and takes too long.”





When asked about the things most important in life to them, people often cite family as number one. Yet millions of Americans fail to take care of their families by getting their estate planning in order. You work hard for your money, and you love your family. If your family is truly the most important thing in your life, it makes sense to make it a priority to get your estate planning completed. Your family is counting on you.

Mike Fiffik,
managing partner with Fiffik Law Group, PC



Estate planning is for the living and not the dead. Having a Will means that your assets go where you need them after you die. Your trusted agent under your financial Power of Attorney makes certain that your assets are spent on your behalf. And your Healthcare Power of Attorney and living Will agent make certain that your healthcare decisions are respected. Failing to estate plan is an invitation for the courts to make these decisions.

Robert Sewell,
partner with Davis Miles McGuire Gardner

The Good News...

LegalShield makes it so easy!



Dear LegalShield,

My husband and I have been wanting to get our Wills done for years. LegalShield has made it so simple, and the turnaround time was amazingly fast. Now we have peace of mind knowing we have things in order. Thank you for the prompt and courteous service. I would definitely recommend this service.

California Member



Dear LegalShield,

I provided LegalShield with a challenge of preparing my Will in a few days as I was leaving to travel for a month. They met the challenge and were able to help me leave papers signed—just in case. I am halfway through my trip and enjoying the peace of mind. Many thanks.

British Columbia Member

LegalShield's dedicated provider
law firms prepare approximately

50,000 Wills

annually, for our members.

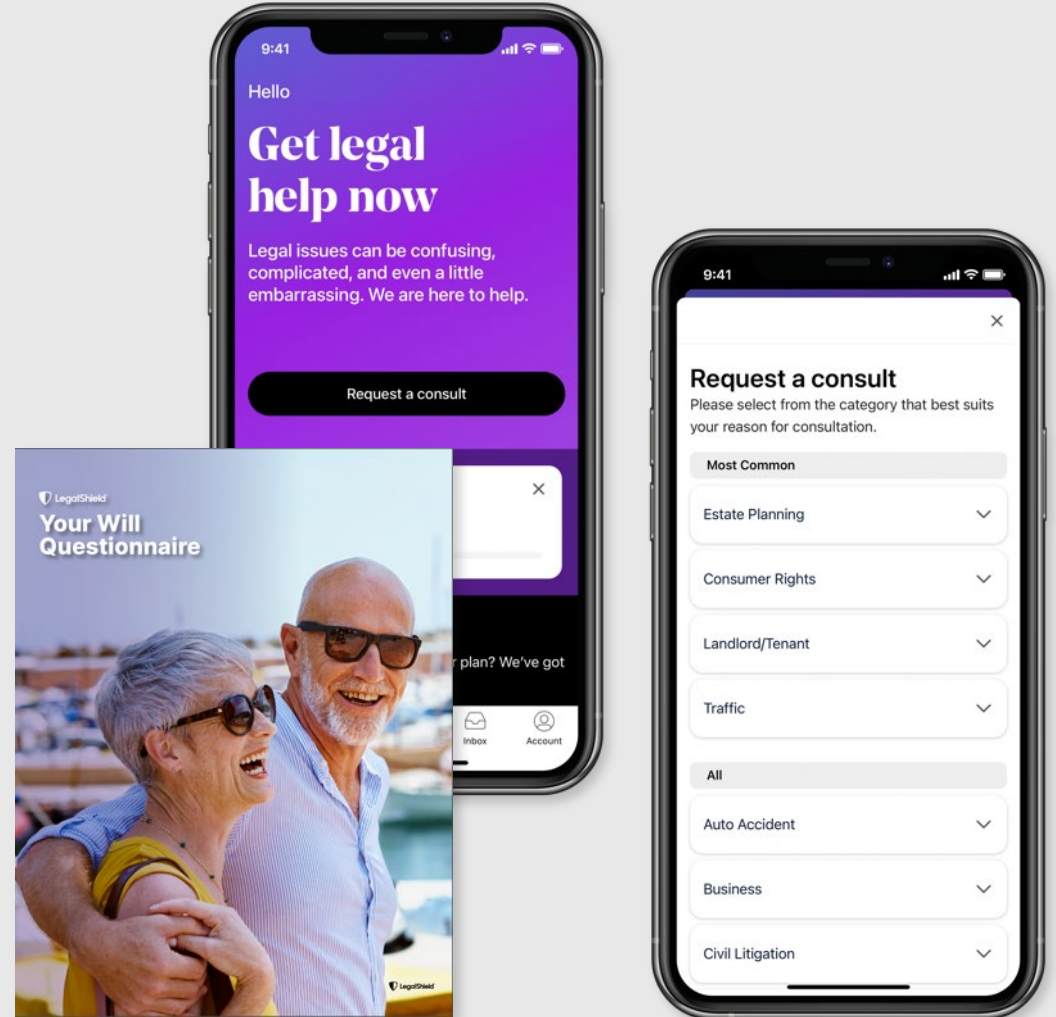
Step 1

- Open the app
- Click “Request a Consult”
- Choose “Estate Planning”

OR

Use Your Will Questionnaire

Available from your provider law firm



Step 2

Complete General Information

Please Print

What you will need to complete this questionnaire:

- Copy of your Prenuptial Agreement (if applicable).
- Names and birth dates of your children and grandchildren (if applicable).
- The name and contact information of the person you've chosen to be guardian of your child(ren), the trustee(s) of their estate, and your personal representative/executor.
- To best serve you in completing your Will for estate tax purposes, you'll be asked to provide the approximate dollar amount of such items as: your home, other real estate, bank accounts, vehicles, retirement plans, life insurance policies, and debts such as mortgages, loans, medical or others over \$5,000.

Helpful information to get you started:

- This Will Questionnaire is NOT your Will. All questions applicable to you must be prepared.
- If you need more space to answer a question, use the number to which it pertains.
- If you have questions while filling out the questionnaire, you can schedule a call on the mic.
- If you need the number to your firm, call (7 a.m. - 7 p.m., Monday-Friday, CT).

Estate
Everything that you own at your passing and taxes. You will make decisions regarding share of your estate that you wish to give to your children, if applicable, and other beneficiaries. And if you wish, you may leave specific investments, heirlooms, etc.) or sums of money.

Will
A document which provides who is to receive your assets, who will administer your estate, who will your children, if applicable, and other beneficiaries.

Peace of Mind
The wonderful feeling you get as a LegalShield member having your Will prepared by a qualified attorney.

Get Started!

For Your Information
A great deal of personal information is requested in your Will Questionnaire. Without all of the information requested, your Provider Law Firm can't ensure your wishes will occur or that the most comprehensive estate planning options have been advised. All information you provide them will remain strictly confidential.

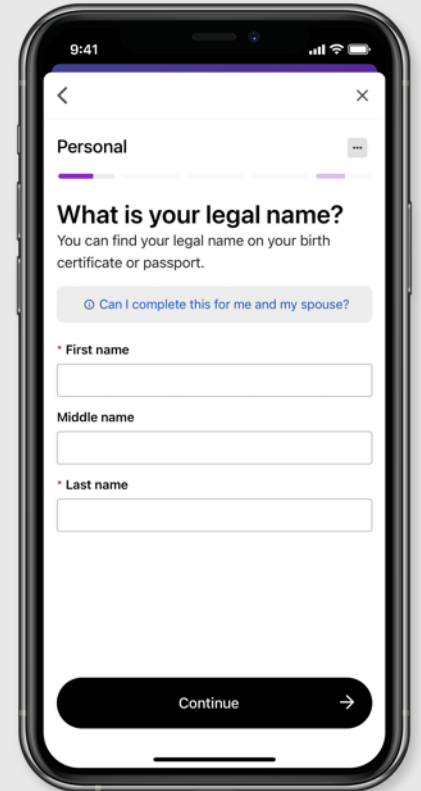
1. Full Name (first, middle, last): _____
All other names by which you have been known: _____
Membership Number: _____
Age: _____ Date of Birth (DOB): _____ Sex: M ___ F ___
Are you a US citizen? ___ Y ___ N ___ If no, country of citizenship: _____

2. Current Residence
Street Address: _____ City: _____
County or Parish: _____ ST: _____ ZIP: _____
Home Phone: _____ Work Phone: _____

3. If you are married, your spouse's full name (first, middle, last, maiden)
DOB: _____ Date of Marriage: _____
Place of Marriage: _____
Are you currently living with your present spouse? ___ Y ___ N ___

Dear LegalShield,
I'm writing to thank you for your firm's excellent preparation of my Last Will and Testament. [My lawyer] has been very professional, knowledgeable, and responsive to my calls and questions. Due to his excellent service, I am pleased to continue using LegalShield and to recommend it to friends, family, and business associates.
Sincerely, Florida Member

*Non-citizen estate taxation varies from taxation for US citizens.



Step 3

Complete Spouse or Partner Information

Your Will Questionnaire

4. Do you and your spouse have a Prenuptial Agreement which identifies and disposes of separate spousal property? ___ Y ___ N ___ N/A
If yes, attach a copy with any filing data.

5. If either you or your spouse has been divorced, please answer the following. If not applicable, please go to question #6.
Date of marriage: _____
Date of divorce judgement: _____
Court rendering judgement: _____
Date of spouse's death (if applicable): _____

6. Have you or your spouse created any trusts and include a copy, if not applicable, please go to question #8.

7. Do you or your spouse expect any inheritance, please go to question #8.

Guardian
A person lawfully invested with the power is incapable of doing so because of age or a biological parent to be appointed as guardian. Please call your Provider Law Firm for info.
NOTE: Louisiana residents, although the provision state, it is highly persuasive in a proceeding for a person with minor children.

Trustee
A person appointed to manage the financial because of age or other incapacity.

Joint Tenants with Right of Survivorship
A single property owned by two or more persons. At the death of one joint tenant, the property passes to the surviving joint tenant.

8. If you have children, including adopted children, state the following for each child. If you do not have children, please go to question #15.

Full Name	Son/Daughter	Date of Birth	Child of Current Marriage? (Y/N)
1.			
2.			
3.			
4.			

9. a. Deceased biological or legally adopted children if applicable.

Full Name	Son/Daughter	Date of Death
1.		

b. Deceased child's living children if applicable:

Full Name	Son/Daughter	Date of Death	Parents Name
1.			
2.			

10. If you have stepchildren, do you want them treated the same as your natural born or legally adopted children in your Will? ___ Y ___ N ___ N/A
If yes, state the following for each:

Full Name	Male/Female	Date of Birth	Parents Name
1.			
2.			

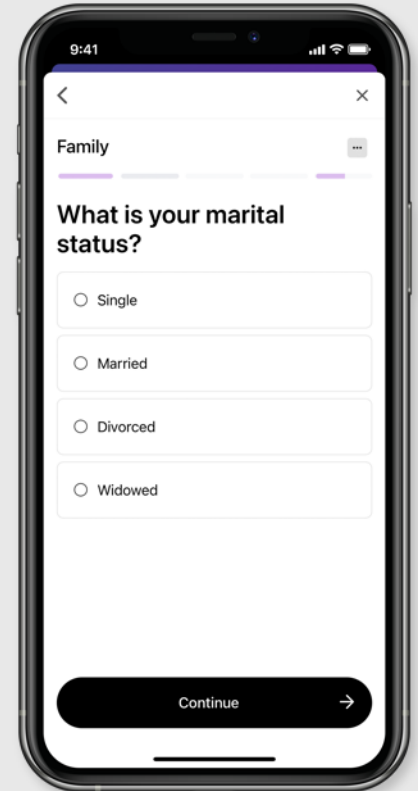
11. If you have grandchildren, state the following for each. If not, go to question #12.

Full Name	Parent's Name	Grandson or Granddaughter	Date of Birth	Living? (Y/N)
1.				
2.				
3.				

12. Are any of your children or other beneficiaries mentally or physically disabled or have special needs? ___ Y ___ N
If so, note any special provisions:

If so, are they presently receiving, or do you anticipate that they may apply for, SSI benefits in the future? ___ Y ___ N
Note: If you leave a bequest, not left to a qualified trust, the recipient might be disqualified from SSI benefits.

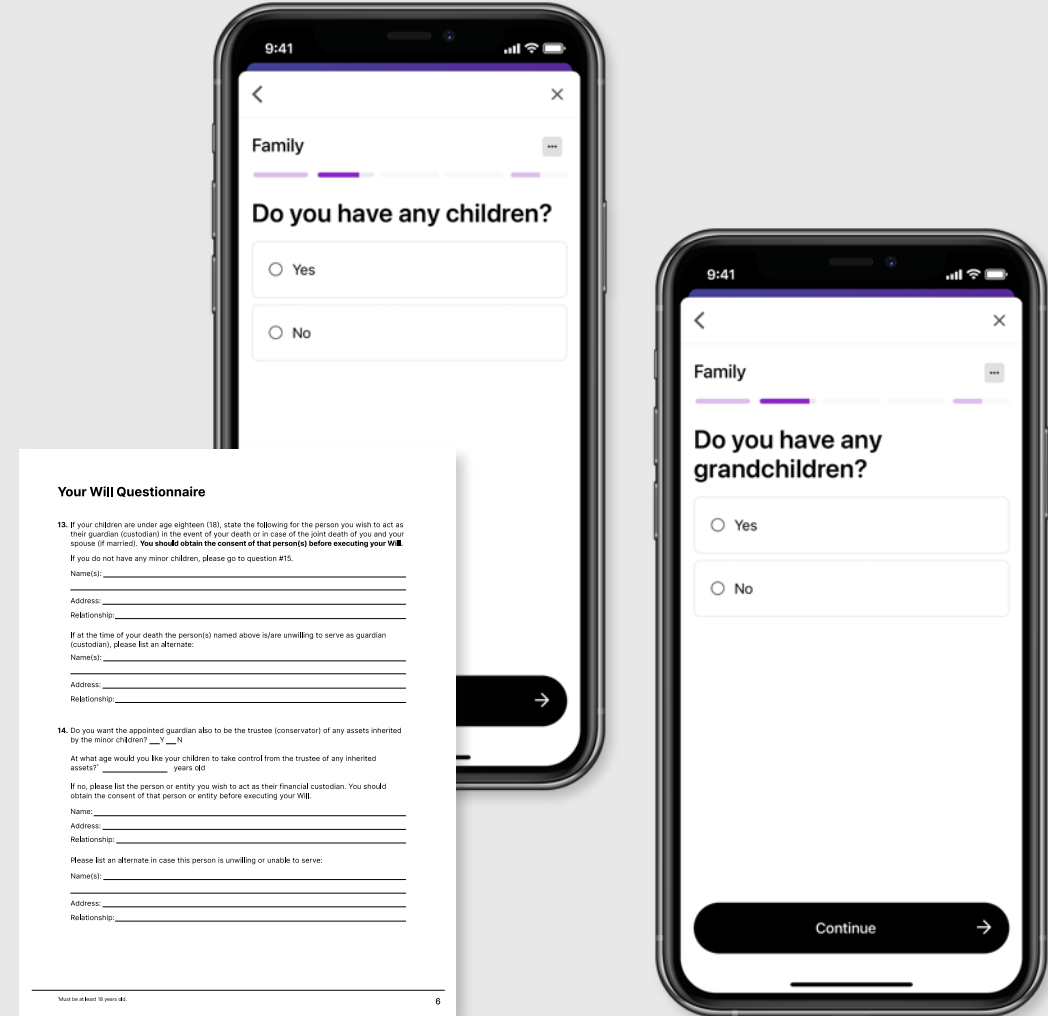
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Step 4

Complete Dependent Information

- Names and Birthdates
- Names and Birthdates of Grandchildren



Step 5

Add Executor Information

9:41

Other parties

Who do you want to appoint as the executor of this will?

This person will ensure the wishes in this will are followed.

Executor

* First name

* Last name

Email

Phone

Relationship to you

9:41

Other parties

Do you want to require that the executor have a bond?

Executor bond

Yes

No

Continue

Step 6

How Should Your Assets be Divided?

Your Will Questionnaire

15. Indicate how you want your assets to pass when you die.

Please check the ONE option you prefer:

OPTION A
I want my assets to pass to my spouse and children as follows:

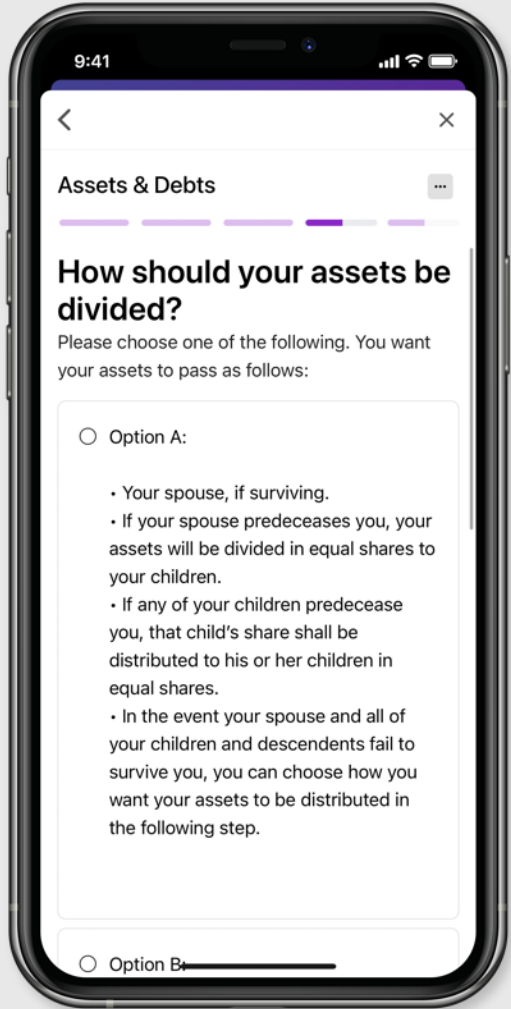
- To my spouse, if surviving.
- If my spouse predeceases me, my assets will be divided in equal shares to my children.
- If any of my children predecease me, that child's share shall be distributed to his or her children in equal shares.
- In the event my spouse and all of my children and descendants fail to survive me, I want my assets to be distributed as follows:

OPTION B
I am unmarried with children and want my assets to pass as follows:

- In equal shares to my children.
- If one or more of my children predeceases me, that child's share in my estate is distributed to his or her children in equal shares.
- In the event all my children and descendants fail to survive me, I want my assets to be distributed as follows:

OPTION C
None of the above. I want my assets to pass as follows:

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Step 7

List Any Significant Debts

Your Will Questionnaire

21. List your estimated debt in each category as applicable. Include the dollar amount in the appropriate column(s).

DEBTS	Individual Debts	Spouse's Separate Debts	Joint/Community Debts	Joint Debts/ Non-Spouse
a. Mortgages on Home, Car, etc.				
b. Signature Loan at Bank				
c. Medical or Other Expenses				
d. Other Debts Over \$5,000				
TOTALS				

Confirmation of Information and Instructions:

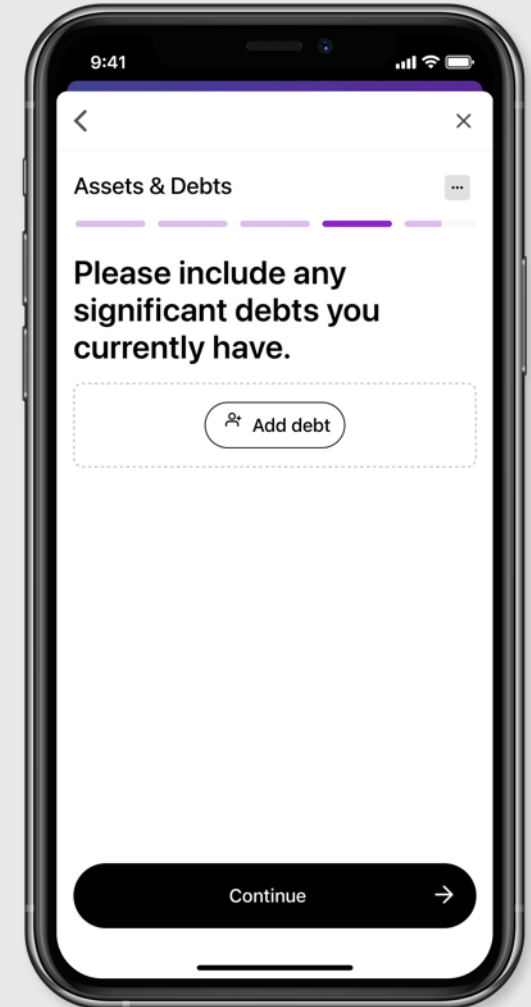
I confirm the information provided by me in this form is complete and accurate and that the instructions I have provided reflect my wishes.

Signature: _____

Print Name: _____

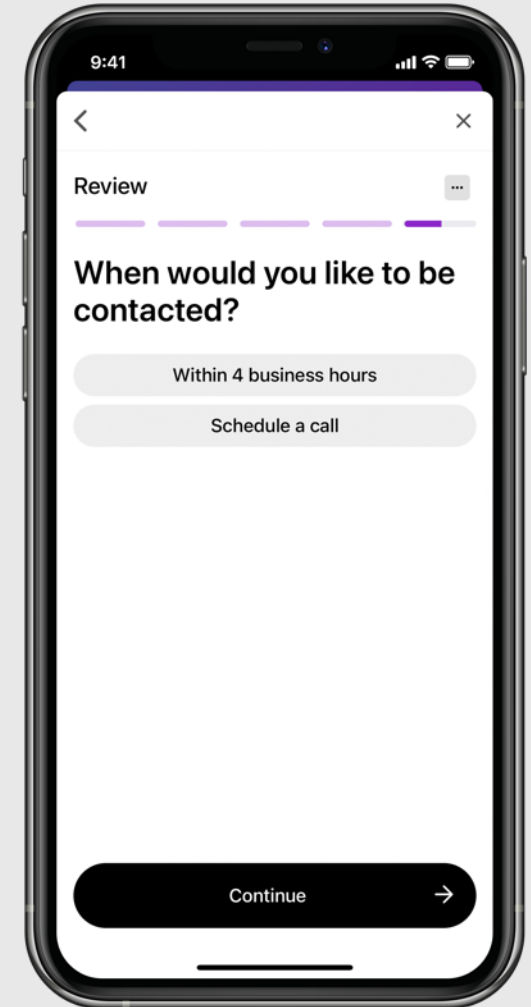
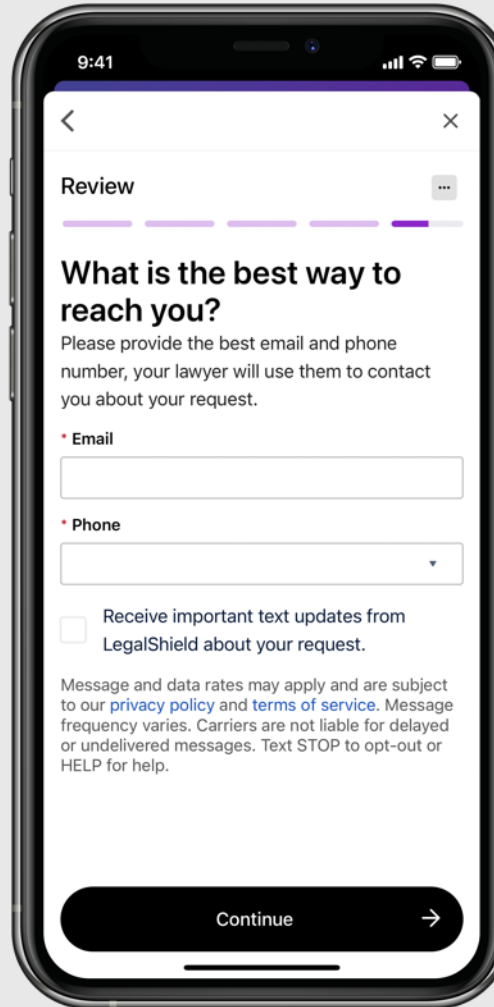
Date: _____ Phone Number: _____

You have now completed your Will Questionnaire! Please see instructions on the next page for final steps on how to get your Will prepared.



Step 8

How to Contact You



Step 9

Review Your Information and Submit to Your Provider Law Firm

Final Steps For Your Will Preparation

TO HAVE YOUR WILL PREPARED:

1. AFTER COMPLETING THE WILL QUESTIONNAIRE, MAIL IT TO YOUR PROVIDER LAW FIRM.

If you need to include additional information to this questionnaire, please include a separate sheet of paper. If you need your Provider Law Firm's address, please call their number which you can find in your electronic membership kit, via the LegalShield mobile app, or by calling Member Services toll-free at 1-800-654-7757.

They will prepare your Last Will & Testament based on the confidential information you provide in your Will Questionnaire. If they need additional information from you while completing your Will, they'll call you.

2. YOUR PROVIDER LAW FIRM SHOULD MAIL YOU YOUR COMPLETED WILL WITHIN FIVE (5) BUSINESS DAYS OF WHEN THEY RECEIVE YOUR COMPLETED WILL QUESTIONNAIRE.

You'll also receive instructions from your Provider Law Firm on how to have your Will finalized.

3. SAFEGUARD YOUR WILL AND MAKE A COPY FOR YOUR EXECUTOR.

Store your Will in a safe place with other important legal documents. Please remember that you—not your Provider Law Firm—are responsible for the safekeeping of your Will.

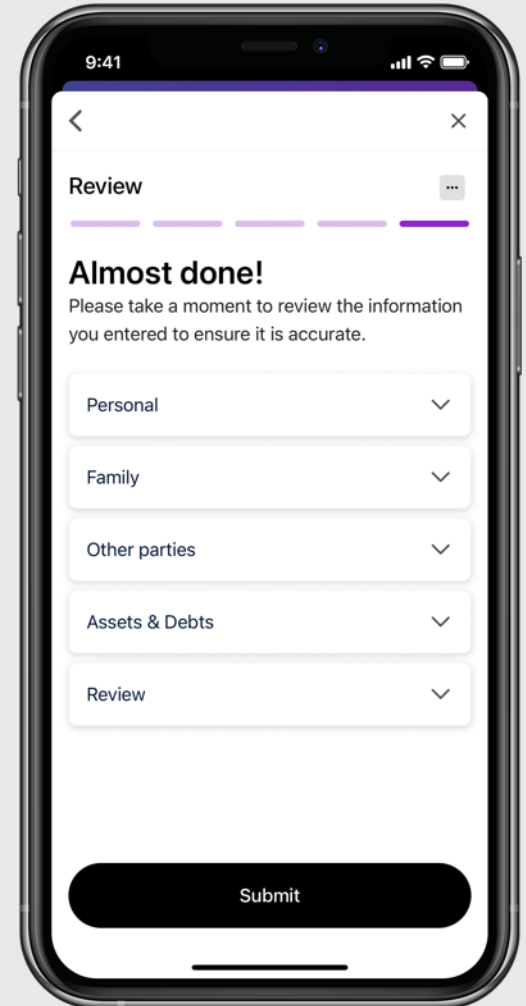
* Louisiana & Missouri Residents: Under law, the Personal Representative serves with Court supervision. Certain actions can be taken by your Personal Representative only after obtaining Court approval, including the sale or transfer of any real estate which is part of your estate. However, you can waive certain Court supervision by electing "Independent Administration" of your estate. By electing "Independent Administration" the expenses associated with probate administration may be lessened. However, because there is less Court supervision, there is a greater chance of dishonesty by the Personal Representative and they must secure the service of an attorney on legal questions arising in connection with the administration of the estate.

Do you wish to elect "Independent Administration" for your estate? Y N

Contracts issued by:
Pre-Paid Legal Services, Inc., and subsidiaries:
Pre-Paid Legal CasualtySM, Inc.
Pre-Paid Legal Access, Inc.
In FL: LS, Inc.
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Thank you for attending.

This is a general overview of the legal plan coverage available from Pre-Paid Legal Services, Inc. ("PPLSI") for illustration purposes only. See a plan contract for specific state of residence for complete terms, coverage, amounts and conditions. Trial defense is not available in all states. PPLSI provides access to legal services offered by a network of provider law firms to PPLSI members through membership-based participation. Neither PPLSI nor its officers, employees or sales associates directly or indirectly provide legal services, representation, or advice.