

Lange Law Firm

A PROFESSIONAL ASSOCIATION

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Since 1976

TO PROSPECTIVE WILL CLIENTS:

We are pleased that you have elected to take advantage of our Will program. In order to enable us to properly draft your Will, we ask that you read these instructions carefully.

1. It is very important that you fill out very completely the attached ESTATE PLANNING QUESTIONNAIRE, and bring it with you to our office when you come in to have your Will prepared. If a husband wife are both having Wills prepared, we need a separate Questionnaire for each, even though the information may be the same. This Questionnaire asks for a lot of information, but it is very important that you provide it so our attorney can make sure the basic Will is appropriate for your situation and so that your Will properly reflects your desires with respect to your estate. All information which you provide will be held in strict confidence.

2. The basic Will which we are offering should be sufficient for the vast majority of you. our attorney will carefully review your ESTATE PLANNING QUESTIONNAIRE to ensure that you do not require a more complex Will or any special drafting. If necessary, we can offer estate planning, complex Wills, trusts or special drafting, and the fees for these services will be fully discussed with you before you are asked to make any commitment.

3. In addition to reviewing your ESTATE PLANNING QUESTIONNAIRE our attorney will meet with you to answer any questions you might have. Your Will will be prepared on our word processor and will be ready for signing during your appointment, thus giving you the convenience of only one trip to our office.

4. The fee for your Will is due and payable at the time of your appointment.

5. Again, please remember to bring this Questionnaire with you to your appointment, along with any of the following that you may have: a Will or trust agreement, a divorce decree, a premarriage contract, a partnership or business agreement and any current financial statements of any such business interests. If you do not have an appointment to have your Will prepared, call our office at (952) 837-1900.

We are a full service law firm, and we trust that you will be satisfied and impressed enough to keep us in mind when you have any other legal needs and recommend us to your family and friends.

LANGE LAW FIRM ESTATE PLANNING QUESTIONNAIRE

PART I - PERSONAL AND FAMILY INFORMATION

1. Full legal name _____
(Do you use middle name or initial when signing legal documents?)
2. Address _____
3. City, State and Zip Code _____
4. County of residence _____
5. Telephone: Home _____ Work _____ Cell _____
6. Email address: _____
7. Place of employment _____
8. Person who knows your whereabouts most of the time, other than a spouse:
Name _____ Telephone _____
9. Marital status: Married _____ Single _____ Divorced _____ Widowed _____
10. Have you been married before? Yes _____ No _____
11. Date of birth _____
12. Social Security No. _____
13. Are you a United States citizen? Yes _____ No _____
14. Full legal name of spouse _____
15. Spouse's date of birth _____
16. Spouse's Social Security No. _____
17. Spouse's place of employment _____
18. Is your spouse a United States citizen? Yes _____ No _____
19. *Children from current marriage:

<u>Name</u>	<u>Birth Date</u>	<u>Marital Status</u>	<u>Address, if different from yours</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

*Please list all of your children's names, even if you plan to leave them out of your Will.

20. *Children from a previous marriage:

<u>Name</u>	<u>Birth Date</u>	<u>Marital Status</u>	<u>Address, if different from yours</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

21. *Children from a current or previous relationship:

<u>Name</u>	<u>Birth Date</u>	<u>Marital Status</u>	<u>Address, if different from yours</u>
_____	_____	_____	_____
_____	_____	_____	_____

*Please list all of your children's name, even if you plan to leave them out of your Will.

22. Are you planning on having more children? Yes_____ No_____ Possibly_____

23. Are any of your children adopted? Yes_____ No_____

24. Are any of your children deceased? Yes_____ No_____

25. Were any of your children born to you when you were unwed, or were any of your grandchildren born to any of your children when they were unwed?

Yes_____ No_____ Please explain:_____

26. Do any of your children or others dependent on you have special needs due to mental or physical disabilities?

Yes_____ No_____ Please explain:_____

27. Are you supporting any persons other than your spouse or children (such as parents, brothers or sisters, etc.)?

Yes_____ No_____ Please explain:_____

PART II - FINANCIAL INFORMATION

A. Real Estate:

1. If you own your home, list the following:

Address _____

Do you own it with anyone else? (If you do, please state who):

Your Opinion of the home's value _____

Approx. balance of mortgage/contract for deed _____

2. If you own any other real estate, such as a farm, cabin, condo, or rental unit, list the following:

Address or location _____

Do you own it with anyone else? (If you do, please state who):

Your opinion of the property's value _____

Type of property (cabin, rental, farm, etc.) _____

*If you own more real estate, please use the back of this page and provide the same information.

B. The name of my financial planner, organization, address and phone number:

_____ When hired: _____

C. Please list below all bank accounts, certificates of deposit, money market certificates, IRA accounts, stocks, bonds or similar assets owned either in your name alone or jointly. (This information is needed in order to determine whether a basic Will is appropriate for your situation. The information you provide is held strict confidence.

Bank or Co.	Type of Asset	In Whose Name	Beneficiary	Approx. Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

*If more space is needed, please continue on the back of this sheet or on a separate sheet of paper.

D. Life Insurance (on your life):

<u>Name of Ins. Co.</u>	<u>Beneficiary</u>	<u>Amount of Policy</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

E. Do you own or have an interest in any businesses? If so, describe briefly and give the approximate value of your interest:

F. If you are covered by a pension or profit sharing plan, please state the name(s) of any beneficiary(s) under the plan, and its approximate value, if known:

G. Describe briefly, and give the approx. value, of any other valuable assets which you own (jewelry, antiques, stamp or coin collections, boats, automobiles, money owed to you by others, etc.):

H. Do you have child support or alimony obligations from a previous marriage? Yes _____ No _____

I. List any major liabilities or debts, aside from mortgages/contracts for deed:

Creditor	Approx. Amount Owed
_____	_____
_____	_____
_____	_____

J. Do you expect your financial situation to change substantially in the next five years?

Yes _____ No _____ Please explain: _____

K. Are you the beneficiary of any trusts? Yes _____ No _____ Please explain: _____

L. Have you given anyone besides your spouse any gifts worth more than \$13,000 in any calendar year?

Yes _____ No _____

M. Have you formally contracted to leave any assets to any person or organization? Yes _____ No _____

N. Have you signed any premarriage contract regarding disposition of your assets? Yes _____ No _____
(If yes, please bring a copy of the agreement to your appointment.)

O. Do you currently have a Will? Yes _____ No _____ (If yes, please bring a copy of your current will to your appointment.)

P. If you have a safe deposit box, please indicate the renters of the box and the location of the box: _____

PART III - GENERAL GOALS AND WISHES FOR YOUR WILL

1. Whom do you wish to name as your PERSONAL REPRESENTATIVE executor? Most married persons name their spouse.

1st Choice: Name and relationship to you _____

Address _____

2nd Choice: Name and relationship to you _____

Address _____

3rd Choice: Name and relationship to you _____

Address _____

2. If you are SINGLE AND HAVE CHILDREN, our basic Will leaves your estate in equal shares to your children. If one of your children should predecease you, do you want that child's share of your estate to:

- a. Be split among your remaining living children _____
- b. Pass to your deceased child's children _____

If you selected (b), please indicate grandchildren, if any:

<u>Name</u>	<u>Date of Birth</u>	<u>Parents</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

If you want to leave your estate to persons other than your children, or only to particular children, please indicate name(s), relationship to you, and address(es) below:

3. If you are SINGLE, WITHOUT CHILDREN, whom would you want to receive your estate?

First Choice (you can choose one or more persons to share in your estate):

Name(s) , Relationship to you, and Address(es) _____

If one of the persons you named does not survive you, do you want such person's share to go to his/her children, if he/she has any? Yes _____ No _____

If you would like to name a second choice of person(s) to receive your estate, please indicate:

Name(s) , Relationship to you, and Address(es) _____

4. If you are MARRIED AND HAVE CHILDREN, our basic Will leaves your estate to your spouse. If your spouse does not survive you, our basic Will leaves your estate in equal shares to your children. If your spouse does not survive you and if one of your children should predecease you, do you want that child's share of your estate to:
- a. Be split among your remaining living children _____
 - b. Pass to your deceased child's children _____

If you selected (b), please indicate grandchildren, if any:

<u>Name</u>	<u>Date of Birth</u>	<u>Parents</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

*If your children all still live with you, or you travel with your entire family, you may want to indicate whom you would like to receive your estate if something happened to your entire family. Most married couples choose to divide their estate in half, and leave half to each spouse's relatives (either parents, brothers and sisters, or nieces and nephews), but you may also choose to leave the estate to one or more charities. Please indicate below the proposed distribution of your estate (including name(s), relationship to you, and address(es) of the intended beneficiaries):

*If you need more space, please continue on a separate sheet of paper.

5. If you are MARRIED, BUT HAVE NO CHILDREN, our basic Will leaves your estate to your spouse. Who would you want to receive your estate if your spouse does not survive you?

Name(s), Relationship to you, and Address(es) - (you can choose one or more persons to share in your estate):

If one of the persons you named does not survive you, do you want such person's share to go to his/her children, if he/she has any

Yes _____ No _____

6. Our basic Will allows you to nominate a GUARDIAN who will be responsible for your children and their estate until they reach the age of eighteen. Whom would you want to be the guardian of your minor children if your spouse does not survive you?

Name(s), Relationship to you, and Address(es) _____

7. Our basic Will also allows you to extend the age under which your children's estates are managed until the age of twenty-one, under the Uniform Transfers to Minor Act. If you would prefer to have your children's estates managed until that age, indicate the name, relationship to you, and address of one individual whom you would like to act as custodian of your children's estates: (Note: This person may be the same person you named in your answer to #6.)

8. If you prefer to have your children's estates managed beyond the age of twenty-one, you will want to set up a children's trust. A children's trust involves additional planning and drafting, as well as additional costs, but it allows more flexibility and control in planning the ages at which your children will receive distributions from your estate. If a children's trust is of interest to you, indicate the name(s), relationship to you, and address(es) of whom you want to act as trustee(s) of your children's estates.

9. Our basic Will allows you to make specific dollar bequests if you so wish (this is optional):

Gift

Name, Relationship to you, and Address of the Recipient

_____	to	_____
_____	to	_____
_____	to	_____
_____	to	_____
_____	to	_____
_____	to	_____

10. If you are married, would you want the specific bequests you named in your answer to #9 to go to the recipients named, even if your spouse survives you?

Yes _____ No _____

11. In addition, our basic Will makes reference to a list of tangible personal property items. Our attorney will distribute a blank list to you, which you may fill out at home, since this list does not need to be witnessed. If you have several personal belongings to distribute, and you would like us to prepare the list, please indicate the items below (this is optional):

<u>Gift</u>		<u>Name, Relationship to you, and Address of the Recipient</u>
_____	to	_____
_____	to	_____
_____	to	_____
_____	to	_____
_____	to	_____

12. If you are married, would you want the items listed in your answer to #11 to go to the recipients named, even if your spouse survives you? Yes _____ No _____

PART IV - MISCELLANEOUS

1. Please give a brief statement of your intentions for your estate:

2. Please indicate below anything else you wish to discuss or questions you want answered.

3. How did you hear about our firm? _____

I hereby certify that the information I have provided in this Estate Planning Questionnaire is complete and accurate to the best of my knowledge. I hereby acknowledge that if I have not provided full and accurate disclosure of information in this Questionnaire, it may be detrimental to my attorney's ability to effectively prepare estate planning on my behalf.

Date: _____

Client's Name

These are two very important documents which you should consider in your Estate Planning. There is an extra charge for these documents.

HEALTH CARE DIRECTIVE (Lange Law Firm, P.A., Attorneys at Law)
(ALSO KNOWN AS HEALTH CARE POWER OF ATTORNEY)

The law authorizing the use of the Health Care Directive became effective August 1, 1998. It allows competent adults to appoint someone, called an agent, to make health care treatment decisions for them when they are unable or unwilling to communicate a decision for themselves. It allows the written expressions of preference and instructions to the agent, which the agent must follow. It helps your family and your doctor. It lets them know the kind of health care treatment you want or don't want if you can't speak for yourself.

The law permits but does not require you to name an alternative agent. However, it is a good idea to name an alternative agent since your primary agent may be out of town or ill when needed to make decisions for you.

Any competent person 18 years of age or older can execute a Health Care Directive. Health Care Directives are not only for older persons; they are for people of all ages. If your 18 year-old child was injured, it would enable you to participate in the heal care decisions.

The Health Care Directive replaces the living will and allows you to express your wishes concerning life support by artificial means, organ donation and disposition of your body at death.

Please complete the following if you would like us to prepare a Health Care Directive for you:

Agent

(If you are married, most people name their spouse):

Name _____

Address _____

Relationship _____

Phone #: _____

Alternative agent

Name _____

Address _____

Relationship _____

Phone #: _____

Alternative Agent (Optional)

Name _____

Address _____

Relationship _____

Phone #: _____

Alternative agent (Optional)

Name _____

Address _____

Relationship _____

Phone #: _____

I wish to donate my organs, tissue and other body parts when I die. Yes _____ No _____

I have agreed in another document or on another form to donate my organs when I die. Yes _____ No _____

I request cremation of my remains. Yes _____ No _____

FINANCIAL POWER OF ATTORNEY (Lange Law Firm, P.A., Attorneys at Law)

A Power of Attorney form is a written authorization for a person to handle property or financial matters for another individual. The person signing the Power of Attorney form and giving someone power over his or her assets is called the "principal." The person named to handle the principal's assets is called the "attorney-in-fact."

You can name one or more persons to act as your attorney(s)-in-fact. You can require the attorneys-in-fact to act jointly, meaning that they must agree on all decisions and both sign all documents related to your financial affairs. In the alternative, you can allow either attorney-in-fact to act at any time. In addition, you can name a successor attorney-in-fact to take over, should the attorney-in-fact you name, die, become incapacitated, resign, or otherwise be unwilling or unable to serve as your attorney-in-fact.

You can designate an expiration date for the powers on the form. If there is no expiration date stated, the form will continue to be in effect until your death, or until you revoke the form. The Power of Attorney form can be revoked at any time, while you are competent, by a notarized written revocation form. A copy of this written revocation form should then be given to your attorney-in-fact, and to any third party who might be relying on the form. In addition, you must designate on the form whether you want the powers given to the attorney-in-fact to continue even if you become incapacitated or incompetent. This makes the form a "Durable" Power of Attorney.

The Power of Attorney form indicates a series of powers you can give to the attorney-in-fact, including power over real estate, personal property items, stocks, bonds, bank accounts, business transactions, and any insurance matters. You can choose to give the attorney-in-fact power over all of these matters, or just restrict the power to certain matters.

The form take effect the date you sign it, however, while you are still competent, you have the right to control your own property and assets. To provide safeguards, you can indicate on the form that the attorney-in-fact is required to give periodic accountings to you, or to another interested party.

You should be sure the person or persons you choose to be your attorney(s)-in-fact are trustworthy, and willing and able to handle the responsibility of managing your financial affairs, should you become incapacitated. A Financial Power of Attorney should eliminate the need for the appointment of a conservator or guardian in the future. The appointment of a conservator or guardian is costly and requires annual accountings to probate court.

If you want us to prepare a Financial Power of Attorney, please complete:

Attorney-in-Fact

(If married, most name spouse):

Name _____

Address _____

Relationship _____

First Successor Attorney-in-Fact

Name _____

Address _____

Relationship _____

Second Successor Attorney-in-Fact

Name _____

Address _____

Relationship _____

CAN YOUR ATTORNEY-IN-FACT TRANSFER ASSETS TO THEMSELVES? YES _____ NO _____