

Estate Plan Flow Questions

Below, are the questions your organization members will encounter as they complete their estate plan.

Basics

Basic Details

- Gender
- Birth Date, Phone Number, Address

Estate Planning Options

- Are you legally married? (Yes/No)
 - →Yes
 - What is your spouse's name?
 - You will be given the option to create a Mirror Will for your spouse at the Review stage of the will-making process.
- What type of estate planning document do you want to make?
 - *California residents tend to choose a Revocable Living Trust

Trust Details

- Do you want to update an existing trust that you already have? (Yes/No)
 - →Yes
 - You will be asked the Full Name of the existing trust and the Execution Date of the existing trust
- What would you like to name your trust?



Nominees

Children and Guardianship Minors

- Do you have any children? (Yes/No)
 - →Yes
 - What are the full legal names of your children?
 - Are any of your children under the age of 18?
 - →Yes
 - In order of preference, who would you like to be the child's guardian if your minor child were left parentless when you pass away?

Pet Care and Pet Care Takers

- Do you have any pets you would like to provide for in your trust? (Yes/No)
 - →Yes
 - Please enter a name and description (eg: Felix the black cat), and species for each pet:*
 - How much money would you like to provide for your pets' needs (food, veterinary costs, etc)?*
 - In order of preference, who should be responsible for taking care of your pets if you pass away?

Assets

Asset Options

- How would you like to provide your assets?
- Many people work with a professional Financial Advisor. Do you?
 - →Yes
 - Advisor's Name, Email, Phone Number
 - Option to notify advisor about estate plan

List Major Assets

- Select the type of asset
 - Depending on the type of asset: a description of the asset, account numbers, etc. might be needed

Estimate Your Assets

- What is the approximate total value of assets distributed by your will?



Residuary

Charitable Gifts	Leaving a gift to an organization of your choice
Primary Beneficiaries	• Who should inherit your residual trust property when you pass away? • Please specify one or more beneficiaries below
Secondary Beneficiaries	• If [first beneficiary] does not survive you, to whom should their portion of the trust property go?
Takers of Last Resort	• Who should inherit your trust property if all of your named beneficiaries do not survive you?*

Gifts

Here you can choose to leave a specific gift in the form of real estate, vehicles, cash, or any other type of item to a particular individual or individuals, or to a nonprofit organization of your choosing.

Funeral

Funeral Wishes	• In order of preference, who will be responsible for carrying out your funeral and final resting place instructions? • What are your wishes for your funeral service? • What are your wishes for your body and final resting place? • Choose any charities that you would like your loved ones to support in your memory
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Provisions

Executors	• Nominate an executor for your will
Digital Executors	• By default, your estate's executor will also serve as your digital executor. Would you like to nominate someone else to act as your digital executor instead? (Yes/No) ○ →Yes ■ In order of preference, what is the full legal name of the person who will be your digital executor? • Would you like your digital executor to have access to the contents of your electronic communications? (Yes/No)
No Contest Clause	• Would you like to include a no-contest clause in your documents? (Yes/No)
Charitable Gift	• This product is free to you because of [ORG]. Will you consider leaving a gift in your will to support their mission? • How much of your estimated total estate will you leave in cash to [ORG]?
Supporting Nonprofits	• Will you make the work of nonprofits easier by letting them know who you are?
Independent Administration	• Would you like to give permission for your estate to be administered independent of court supervision? (Yes/No/Say Nothing)
Personal Statement	• Would you like to attach a personal statement to your will? ○ →Yes ■ Write your personal statement below

