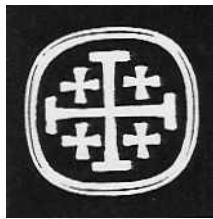


Will Writing Appointment Questionnaire



THE EPISCOPAL DIOCESE OF CALIFORNIA
OFFICE OF GIFT PLANNING

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Empowering Generosity
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THE BOOK OF COMMON PRAYER DIRECTIVE

“The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all person to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able to leave bequests for religious and charitable uses.” (Book of Common Prayer, p. 445.)

CONFIDENTIAL WILL QUESTIONNAIRE

To follow the Book of Common Prayer Directive, the Episcopal Diocese of California has arranged for Will Writing Appointments with attorneys who have volunteered their time to discuss writing a will for you. This Will Writing Appointment Questionnaire is intended to assist you and your attorney in creating your will. It is not a will. Its completion is completely voluntary. The more accurately you complete the Questionnaire, the better your attorney will be able to assist you. At the beginning of your will writing interview, please present your questionnaire to the attorney.

If you have questions, please make a note of them so that you may discuss them when you meet with your attorney. If you do not understand a question, leave it blank and make a note of the question.

Your responses to this Will Writing Appointment Questionnaire are strictly CONFIDENTIAL between you and your attorney. By law, your attorney may not share your responses with anyone, including your spouse, children, family, minister, church, the Episcopal Diocese of California or any other person or entity, without your permission. If you have any questions regarding the confidentiality of this Questionnaire, raise them with your attorney.

WARNING: The Episcopal Diocese of California Will Writing Appointment is intended to assist you in writing a will. A will is one component of a complete estate plan. A complete estate plan may include the use of a will, joint tenancies, beneficiary designations, various trusts, durable power of attorney for property management and advance health care directive. You are encouraged to discuss the various components of a complete estate plan with your attorney. However, the creation of a complete estate plan is beyond the scope of the Episcopal Diocese of California Will Writing Appointment.

PERSONAL INFORMATION

Spouse 1

Full Name _____

Signature Name _____

Birth date _____

Home Address _____ City _____ State _____ Zip _____

County of Residence _____

Telephone _____

Home Business Cell e-mail
Married Date of Marriage _____ Divorced Widowed Single
Domestic partner Date of registration _____ California City _____

Spouse 2

Full Name _____

Signature Name _____

Birth date _____

Home Address _____ City _____ State _____ Zip _____

County of Residence _____

Telephone _____

Home Business Cell e-mail

CHILDREN

(Use full name. Use "J" if both spouses are the parents,
or name if only one spouse is the parent.)

Name	Parent(s)	Birth date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

GUARDIANS

If you have children under 18 years of age, list the full names of your
proposed or actual guardians for your children.

Primary Guardian(s) _____

Successor Guardian(s) 1st Set _____

Successor Guardian(s) 2nd Set _____

EXECUTOR

Name _____

Address _____

Phone _____

Email _____

IMPORTANT FAMILY QUESTIONS
 (Please check "Yes" or "No" for your answer)

	Yes	No
Do you have any adopted children?		
Do any have any children with special educational, medical, or physical needs?		
Have you or your spouse been divorced?		
Have you and your spouse ever signed a pre- or post-marriage contract?		
Have you or your spouse been widowed?		
Have you lived in any other state other than California while married to your current spouse?		
Have you or your spouse ever filed federal or state estate tax returns?		
Have you or your spouse completed previous will, trust or estate planning?		
Are both you and your spouse United States citizens?		
If you answered "No," are either you or your spouse a resident or a non-resident alien?		

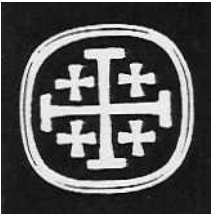
ASSET SUMMARY

ASSETS			<u>Amount¹</u>
	Single Person	Spouse 1	Spouse 2
Cash	_____	_____	_____
Bank Accounts	_____	_____	_____
Investment Accounts	_____	_____	_____
Real Property including residence	_____	_____	_____
Stocks	_____	_____	_____
Bonds	_____	_____	_____
Personal Effects	_____	_____	_____
Retirement Plans (IRA, 401(k), etc.)	_____	_____	_____
Life Insurance Policies and Annuities	_____	_____	_____
Mortgages, Notes, and Other Receivables	_____	_____	_____
Partnership Interests	_____	_____	_____
Corporate Business and Professional Interests	_____	_____	_____
Farm and Ranch Interests	_____	_____	_____
Oil, Gas, and Mineral Interests	_____	_____	_____
Anticipated Inheritance, Gift or Judgment	_____	_____	_____
Other Assets	_____	_____	_____
Total Assets	_____	_____	_____
LIABILITIES			<u>Amount</u>
	Single Person	Spouse 1	Spouse 2
Loans Payable	_____	_____	_____
Accounts Payable	_____	_____	_____
Real Estate Mortgages Payable	_____	_____	_____
Contingent Liabilities	_____	_____	_____
Loans against Life Insurance	_____	_____	_____
Unpaid Taxes	_____	_____	_____
Other Obligations	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total Liabilities	_____	_____	_____
Net Estate	_____	_____	_____

¹ Joint Tenancy (JT), Tenancy in Common (TIC) and Community Property (CP) values are divided ½ in the Spouse 1 column and ½ in the Spouse 2 column.

CLIENT NOTES AND QUESTIONS

ATTORNEY NOTES



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**CONSENT TO CONFLICTS OF INTEREST
BETWEEN MULTIPLE CLIENTS
(Complete this consent if there are multiple clients
seeking advice such as a husband and a wife or domestic partners.)**

Conflicts of interest frequently occur in estate planning and, by law, attorneys may not represent multiple clients, without the informed written consent of each client of the attorney's duty of confidentiality and the potential for conflicts of interest between the clients.

When multiple clients, such as husbands and wives or domestic partners, are represented by one attorney, conflicts of interest may arise. These conflicts can include whether a communication or item of information should be withheld from one client at the request of another, how property should be held (e.g., in one name, in both names as community property or joint tenancy), and how property should be disposed of, and what person should serve in a fiduciary capacity (e.g., executor, trustee, guardian). In addition, clients may have different interests, goals, or perspectives regarding these or other matters.

By law, an attorney may not disclose confidential communications or secrets of a client unless the client consents to that disclosure. If a client consents, the attorney may disclose secrets and confidential communications unless the client informs the attorney that a particular secret or communication be considered confidential and withheld from others.

By signing below, each client expressly consents to multiple representation despite the possibility of conflict and the disclosure of each client's secrets and confidential communications to the other client. Nothing in this provision is intended to authorize, under any circumstances, the attorney's disclosure of confidential information to any individual or entity other than the other client.

The attorney may not provide will writing services unless each potential client first signs this CONSENT TO CONFLICTS OF INTEREST authorizing the attorney to perform the services with the client's knowledge that a conflict of interest may exist and authorizing a disclosure of secrets and confidential communications between the clients.

Each client remains completely free to seek other counsel at any time even if he or she has signed this consent form. If you have any questions concerning signing this consent, you should discuss them with your attorney prior to signing.

CONSENT

Each of the undersigned consents and gives approval to representation by the attorney.

Dated: _____

Dated: _____

CONSENT TO CONFLICTS OF INTERESTS BETWEEN THE CLIENT AND THE EPISCOPAL DIOCESE OF CALIFORNIA

Conflicts of interest frequently occur in estate planning and, by law, attorneys may not represent a client, without the informed written consent of the client, if the attorney has an interest in the subject matter of the employment.

The attorneys who participate in this will writing program volunteer their time and provide their services, in part, with the hope that those attending will include the EPISCOPAL DIOCESE OF CALIFORNIA and ministries belonging to it in their estate plans. To this extent, claims could be made that the lawyers providing these legal services have conflicting interests between the client and the EPISCOPAL DIOCESE OF CALIFORNIA and ministries belonging to it.

Consequently, the attorney may not provide will writing services unless each potential client first signs this CONSENT TO CONFLICTS OF INTEREST authorizing the attorney to perform the services with the client's knowledge that a conflict of interest may exist.

Each client remains completely free to seek other counsel at any time even if he or she has signed this consent form. If you have any questions concerning signing this consent, you should discuss them with your attorney prior to signing.

CONSENT

Each of the undersigned consents and gives approval to representation by the attorney.

Dated: _____

Dated: _____

