
JUDICIAL ADVOCATES

Federal Litigation Consulting & Document Preparation

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Will Preparation

Client Intake Questionnaire

IMPORTANT DISCLOSURE: Judicial Advocates is a federal litigation consulting and document preparation service. **We are not a law firm and are not licensed to practice law.** We do not provide legal advice. We provide research, consulting, litigation strategy, and document preparation services. No attorney-client relationship is created by the completion of this questionnaire or the retention of our services. We strongly recommend that all documents prepared by Judicial Advocates be reviewed by a licensed attorney prior to filing.

Date Completed:

Completed By:

QUICK START GUIDE — READ THIS FIRST

This questionnaire collects the information needed to prepare your Last Will and Testament. Organized into **3 parts**. If you do not have all information immediately available, complete what you can and note items to follow up.

GATHER BEFORE STARTING:

- Full legal names and dates of birth for all beneficiaries
- Property records (deeds, vehicle titles)
- Bank and investment account information
- Life insurance policy details
- Name and contact info for desired Executor
- Name and contact info for desired Guardian (if minor children)

PART	SECTIONS	COVERS	EST. TIME
Part 1	I – III	Your Information & Family	~10 min
Part 2	IV – VII	Assets, Beneficiaries & Bequests	~15 min
Part 3	VIII – X	Executor, Guardian & Certification	~10 min

PART 1 OF 3: YOUR INFORMATION & FAMILY (~10 minutes)

SECTION I: TESTATOR INFORMATION

1. Full Legal Name:
2. Date of Birth:
3. SSN (last 4):
4. Current Address:
City/State/ZIP:
5. Phone:
6. Email:
7. County of Residence:

WHY WE ASK: Oklahoma law governs wills executed in Oklahoma. Your county of domicile determines which court handles probate.

SECTION II: MARITAL STATUS & SPOUSE

8. Marital Status:
Married Single Divorced Widowed
9. Spouse Full Legal Name (if married):
10. Spouse DOB:
11. Date of Marriage:
12. Do you have a prenuptial or postnuptial agreement?
Yes No

WHY WE ASK: Under Oklahoma law (84 O.S. § 44), a surviving spouse has certain statutory rights that cannot be eliminated by will. We need to know about any agreements that affect property distribution.

SECTION III: CHILDREN & DEPENDENTS

13. Do you have children?
Yes No

Table with 4 columns: Full Name, DOB, Relationship, Minor? and 3 empty rows.

Relationship: biological, adopted, stepchild. Include deceased children if relevant to distribution.

14. Do you wish to disinherit any child or family member?

Yes

No

If yes, identify who and state your reasons:

WHY WE ASK: *Intentional disinheritance must be explicit in the will. An omitted child may claim a share under Oklahoma's pretermitted heir statute (84 O.S. § 132).*

PART 2 OF 3: ASSETS, BENEFICIARIES & BEQUESTS (~15 minutes)

SECTION IV: ASSET INVENTORY

WHY WE ASK: We need a complete picture of your assets to ensure your will properly disposes of your estate. Assets not specifically addressed pass under the residuary clause.

15. Real Property:

Description/Address	Approx. Value	How Titled

16. Bank Accounts:

Institution	Type	Approx. Balance

17. Retirement/Investment:

Institution	Type (401k/IRA/Brokerage)	Approx. Value

18. Vehicles:

Year/Make/Model	Approx. Value	Title Holder

19. Life Insurance:

Company	Policy Amount	Current Beneficiary

20. Other Significant Assets (business interests, collections, jewelry, etc.):

SECTION V: BENEFICIARIES

Full Name	Relationship	Address/Contact	% or Specific Gift

21. Residuary Beneficiary (receives everything not specifically given):

Name: _____

Alternate (if primary predeceases you): _____

SECTION VI: SPECIFIC BEQUESTS

22. Do you wish to make specific gifts of particular items?

Yes

No

Item/Property	Beneficiary	Alternate Beneficiary

23. Charitable Bequests:

Yes

No

If yes, list organization(s) and amount/percentage:

SECTION VII: SPECIAL PROVISIONS

24. Do you want to create a trust within your will (testamentary trust)?

- Yes No Need Guidance

Testamentary trusts are common when minor children are beneficiaries to manage their inheritance until adulthood.

25. Any special conditions on bequests?

(e.g., age conditions, education requirements, etc.):

26. Funeral/burial preferences:

- Burial Cremation No Preference Pre-Arranged

Additional instructions:

PART 3 OF 3: EXECUTOR, GUARDIAN & CERTIFICATION (~10 minutes)

SECTION VIII: EXECUTOR (PERSONAL REPRESENTATIVE)

WHY WE ASK: The Executor manages your estate after death — pays debts, distributes assets, files tax returns, and handles probate. Choose someone you trust who is organized and responsible. Always name an alternate in case your first choice is unable or unwilling to serve.

Primary Executor:

27. Full Name: _____

28. Relationship: _____

29. Phone: _____

30. Address: _____

Alternate Executor:

31. Full Name: _____

32. Relationship: _____

33. Phone: _____

34. Address: _____

SECTION IX: GUARDIAN FOR MINOR CHILDREN

35. Do you have minor children who need a guardian named?

Yes No

Primary Guardian:

36. Full Name: _____

37. Relationship: _____

38. Phone: _____

39. Address: _____

Alternate Guardian:

40. Full Name: _____

41. Relationship: _____

42. Phone: _____

43. Address: _____

WHY WE ASK: If both parents die, the court appoints a guardian for minor children. Naming one in your will carries significant weight with the court. Discuss this with the person first.

SECTION X: ADDITIONAL INFORMATION

44. Do you have an existing will?

Yes No

If yes, the new will should revoke all prior wills.

45. Do you have a Power of Attorney or Healthcare Directive?

Yes — Both Yes — POA Only Yes — Healthcare Only No

We can prepare these companion documents if needed.

46. Is there anything else we should know?

CERTIFICATION & DECLARATION

I certify under penalty of perjury that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge. I understand that false or misleading information may adversely affect the preparation and outcome of my case.

I acknowledge that Judicial Advocates is a federal litigation consulting and document preparation service, not a law firm, and that no attorney-client relationship is created by the completion of this questionnaire or the retention of their services. I have been advised to have all documents reviewed by a licensed attorney prior to filing.

Signature:

Date: _____

Printed Name: _____

ACKNOWLEDGMENT OF DISCLOSURE

I have read and understand the Important Disclosure on page 1 of this questionnaire. I understand that Judicial Advocates is not a law firm and does not provide legal advice.

Signature:

Date: _____

Printed Name: _____
