

WILLS FOR HEROES PROGRAM EXPLANATION AND QUESTIONNAIRE

In an effort to show our appreciation for all that fire fighters and police officers do to help our community, Gateway Computers, the Young Lawyers Division of the South Carolina Bar, and the law firm of Nelson Mullins Riley & Scarborough, L.L.P. has instituted this program to offer free basic Wills.

The complementary Wills we offer are not for everyone. To enable us to offer Wills to all firefighters and police officers, the Wills need to be “basic.” As a result, the services offered may not be appropriate for persons with large or complicated estates, or those who want to set up sophisticated Trusts. For the purposes of this Will program, a large estate would constitute an estate in excess of \$600,000.00. Your estate consists of your cash, personal property, stock and bonds, real estate, savings, inheritances and retirement assets like a 401(K). If you have a large or complicated estate or desire complex Trust arrangements, do not partake in this program. You should instead contact a lawyer who specializes in the area of Wills and Trusts.

Please note that no lawyer involved in this process has performed a conflict search on your name; if you are aware of any legal proceeding involving you, please alert the attorney at the beginning of the interview.

With that understanding, this worksheet will answer some common questions and prepare you to discuss your needs with an attorney. It will also provide a convenient form to record your important information. All discussions with an attorney will be kept confidential.

You might find the following questions and answers to be helpful to your understanding of why you might want or need a Will.

WHAT IS A WILL? A Will is a legal document that states your desires concerning what will happen to your assets after your death. A Will also contains other specific directions from you

- Spouse's Name: _____
- Names and ages of all your children. _____

- Are adopted children, grandchildren, etc. to be treated as your blood children, grandchildren, etc. Yes No
- Are there others (e.g. stepchildren) that you would like treated the same as a child of yours? If so, please provide name(s): _____

- Who do you want to be the Personal Representative or Executor of your estate?: _____

- Secondary Personal Representative if your primary Personal Representative is unable or unwilling to serve: _____

- Whom do you wish to be the guardian for and have custody of your minor children? _

- Backup Guardian? _____

BASIC WILL DISPOSITIVE OPTIONS OFFERED

(Check the one you want.)

- 1. Entire estate left to spouse if spouse survives. If spouse does not survive equally to children, grandchildren by a deceased child take the share of the deceased child. Any assets left to someone under age 21 held in trust for his or her benefit until age 21.

[] 2. All in trust for spouse (Personal Representative is Trustee), equally to children at death of spouse. Same provisions for a trust for children or grandchildren under age 21 as described in (1) above.

[] 3. All to children equally, grandchildren by a deceased child taking the share of the deceased child. Same provisions for a trust for assets left to someone under age 21. SELECT THIS OPTION ONLY IF YOU ARE NOT MARRIED AND HAVE CHILDREN.

[] 4. All assets to a designated beneficiary or beneficiaries. If one or more of the beneficiaries is an individual you should clearly provide what is to happen if that individual predeceases you. THIS OPTION NOT AVAILABLE, IF YOU ARE MARRIED.

Beneficiary(ies) _____

NOTE: If one of the four options above does not accurately describe the disposition you desire to make of your assets, we are not able to assist you through this program. If one of these four options describes your desired disposition of your assets, please also provide the following information:

- Approximate Value of Estate:
 - Real Estate: _____
 - Life Insurance that passes through Estate: _____
 - Vehicles: _____
 - Stocks & Bonds: _____
 - Money owed to you: _____
 - Inheritance: _____

- Other money and property: _____

Please sign and date below indicating that you have read and completed this Explanation and Questionnaire.

Signed:

Date