

**WILL QUESTIONNAIRE**

**Restricted Native Allotment/Townsite Lot**

Part I: Background Information

In the first part, we will need detailed information about your background. Please answer each question completely. The laws regarding wills can be complicated, and so every question is important. If you do not know the answer to a question, write "do not know" in the space for the answer.

What is your legal name, including any full middle name?

\_\_\_\_\_

Are you known by any nicknames, maiden names, and if so, what are they?

\_\_\_\_\_

Mailing address \_\_\_\_\_

\_\_\_\_\_

Phone Number \_\_\_\_\_ Work Number \_\_\_\_\_

Village Number \_\_\_\_\_

Date of Birth \_\_\_\_\_ Place of Birth \_\_\_\_\_

Marital

Status *(Single/ Married/ Widowed/ Seperated)* \_\_\_\_\_

If you have ever been married, please complete the following:

Name of Spouse    Date of Marriage    Still Married?    How Ended?    When Ended?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If you are married but separated, what is the name of your spouse and when did you become separated? \_\_\_\_\_

\_\_\_\_\_

List **All** the names of all your living children, including those by a prior marriage, adopted, and also step-children: ***(please include phone numbers use back of this sheet if needed).***

Name                      Address                      Date of Birth                      Natural, Step, or Adopted?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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List the names of all your deceased children, including those by a prior marriage, adopted, and also step-children:

Name                      Natural, Step, or Adopted?                      Date of Death

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If any of your deceased children had children who are now living, please list their names and indicate who their parent is:

Name of Surviving Grandchild      Address                      Name of Their Deceased Parent

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List the names of any grandchildren you wish to give a portion of your property to:

Name                      Address(City/State)                      Name of Their Parent

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Please list the names of your parents and siblings **(please include phone numbers)**:

Name                      Date of Birth      Address                      Alive or Date of Death

Father \_\_\_\_\_

\_\_\_\_\_

Mother \_\_\_\_\_

\_\_\_\_\_

Siblings \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

PART II: PROPERTY DISTRIBUTION

We come now to the important part of listing all of the property you own primarily or jointly, including bank accounts, land claims stock, life insurance, boats and fishing gear, limited entry permits, automobiles, houses, land, native allotments, guns, television sets, jewelry, etc. Keep in mind that you can give each item to one person if you wish, or you can divide your property to several people (the only thing you cannot divide is a limited entry permit). It is completely up to you. We will also need first and second choices in case the person you list as first choice is already deceased or is not able to accept your gift at the time of your death.

Do you have any bank accounts, including checking, saving, or credit union accounts that you are the primary on? \_\_\_\_\_ If so, please complete the following:

Kind of Account

Name of Bank

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Is there anyone else listed on the account, and if so, who? \_\_\_\_\_

\_\_\_\_\_

Please list the people you want the money in the account to go to when you pass away: \_\_\_\_\_

Who would be your second choice? \_\_\_\_\_

**[OPTIONAL]** Do you own any stocks [including Alaska Native Claims Settlement Act(ANCSA) stock, bonds, notes, or Mortgages? \_\_\_\_\_

If you own ANCSA stock, what Regional corporation and village corporation are you enrolled in? Regional \_\_\_\_\_ Village \_\_\_\_\_

What are the name(s) of the person(s) that you want your Land Claims stock to go to? Regional \_\_\_\_\_

Village \_\_\_\_\_

Who would be your second choice? \_\_\_\_\_

Do you own your house? \_\_\_\_\_

Are you buying a house through HUD or the Housing Authority? \_\_\_\_\_

Do you own any homes anywhere else? \_\_\_\_\_

Do you own any land anywhere? \_\_\_\_\_

If you answered yes to any of these questions, please list the location (village/city)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

In whose name is the house and land?\_\_\_\_\_

Who do you want to will your home to?\_\_\_\_\_

What about your second choice?\_\_\_\_\_

Do you have a camp site from your Corporation or Tribe, if so Where\_\_\_\_\_

*If you can, please provide copy of camp site Permit.*

Who do you want to give it to when you pass away?\_\_\_\_\_

Who is your second choice?\_\_\_\_\_

**NATIVE ALLOTMENT/TOWNSITE:** We will order an **INVENTORY** which will list the legal descriptions of ALL Restricted Property you own.

Do you own your OWN Native Allotment?\_\_\_\_\_

Who do you want to give it to when you pass away?\_\_\_\_\_

Who is your second choice?\_\_\_\_\_

Did you Inherit or receive Native Allotment Land from someone else?\_\_\_\_\_

Who do you want to give it to when you pass away?\_\_\_\_\_

Who is your second choice?\_\_\_\_\_

Do you own your OWN Townsite Lot?\_\_\_\_\_

Who do you want to give it to when you pass away?\_\_\_\_\_

Who is your second choice?\_\_\_\_\_

Did you Inherit a Townsite Lot that you received from someone else?\_\_\_\_\_

Who do you want to give it to when you pass away?\_\_\_\_\_

\_\_\_\_\_

Who is your second choice?\_\_\_\_\_

Do you have any life insurance?\_\_\_\_\_ If so, in what company?\_\_\_\_\_

\_\_\_\_\_

Who is listed as the beneficiary under the terms of the policy?\_\_\_\_\_

Is that who you want to give your insurance money to?\_\_\_\_\_

\_\_\_\_\_

Who is your second choice?\_\_\_\_\_

**Here is a list of things you may include in your will:**

Boat (what size/Make/Model)\_\_\_\_\_

Who do you want to give it to when you pass away?\_\_\_\_\_

Who is your second choice?\_\_\_\_\_

Motor (Make/Model) \_\_\_\_\_

Who do you want to give it to when you pass away? \_\_\_\_\_

Who is your second choice? \_\_\_\_\_

Fishing Gear \_\_\_\_\_

Who do you want to give it to when you pass away? \_\_\_\_\_

Who is your second choice? \_\_\_\_\_

Fishing Permit(only one person can own a permit)? \_\_\_\_\_

Who do you want to give it to? \_\_\_\_\_

Who is your second choice? \_\_\_\_\_

Trucks/Cars: (Year/Make/Model) \_\_\_\_\_

Who do you want to give it to when you pass away? \_\_\_\_\_

Who is your second choice? \_\_\_\_\_

4-Wheelers: (Year/Make/Model) \_\_\_\_\_

Who do you want to give it to when you pass away? \_\_\_\_\_

Who is your second choice? \_\_\_\_\_

Snowmobiles: (Year/Make/Model) \_\_\_\_\_

Who do you want to give it to when you pass away? \_\_\_\_\_

Who is your second choice? \_\_\_\_\_

Argo/Side-by-Side (Year/Make/Model) \_\_\_\_\_

Who do you want to give it to when you pass away? \_\_\_\_\_

Who is your second choice? \_\_\_\_\_

Do you own any rifles or other guns? \_\_\_\_\_ If so, describe them: \_\_\_\_\_

\_\_\_\_\_

Who do you want to give them to? \_\_\_\_\_

\_\_\_\_\_

Who is your second choice? \_\_\_\_\_

Do you own any television sets or VCRs? \_\_\_\_\_ If so, describe them: \_\_\_\_\_

\_\_\_\_\_

Who do you want to give them to? \_\_\_\_\_

\_\_\_\_\_

Who is your second choice? \_\_\_\_\_

Do you own any property of value (traps, jewelry, family heirlooms, antiques, etc.) that you wish to list and give to someone in particular?\_\_\_\_\_ If so, describe property:

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Who do you want to give them to?\_\_\_\_\_

Who is your second choice(s)?\_\_\_\_\_

Do you own any Ulu's/Kuspuk's/Parka's/Mukluk's\_\_\_\_\_

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Who do you want to give it to when you pass away?\_\_\_\_\_

Who is your second choice?\_\_\_\_\_

Finally, there will be a special section in your will called a "residue" clause. This covers anything in your will that you have not mentioned and anything you acquire in the future. You can give your "residue" to one person or divide it equally to several people. Who do want to give your "residue" to?\_\_\_\_\_

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Who is your second choice(s)\_\_\_\_\_

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### PART III: MISCELLANEOUS INFORMATION

You must now select the "executor" of your estate. The executor is the person who is responsible for taking care of your property after you die, and seeing that everything is distributed properly. The executor may be a spouse, relative, personal or business friend, etc. It should be an adult. It will be this person's job to contact a lawyer after you die and to see that the paperwork is done right. The most important thing is to pick a person you trust. It is recommended that the executor be a resident of Alaska. What is the name, mailing address, and the relationship to you of your first choice as executor of your estate?\_\_\_\_\_

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Who is your second choice?\_\_\_\_\_

If you have minor children at the time of your death, and your spouse has already passed away, it is important that you name an adult to be the "legal guardian" to take care of your minor children (this is a very important question). You and your spouse

should also talk with any person who would be a guardian to make sure they are willing to take on the responsibility. Please list the name, mailing address, and relationship of the adult person whom you desire to be the guardian of your children:

\_\_\_\_\_  
\_\_\_\_\_

Who is your second choice? \_\_\_\_\_

Do you want to specify certain funeral arrangements (i.e. burial or cremation, type of ceremony etc.)? \_\_\_\_\_ If so, please describe: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Have you ever made a will before? \_\_\_\_\_ If so, when? \_\_\_\_\_

Did Alaska Legal Services help with the previous will? \_\_\_\_\_

Do you have a copy of any previous wills? \_\_\_\_\_ If so, please attach to this form.

Today's Date \_\_\_\_\_

I certify that the above information is true and that I am a citizen of the United States or Lawful Permanent Resident.

\_\_\_\_\_  
Signature of Testator (person wanting a will)

\_\_\_\_\_  
Printed Name