

Wills Bar Practice Exam (Sample)

Study Guide



Everything you need from our exam experts!

This is a sample study guide. To access the full version with hundreds of questions,

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Introduction

Preparing for a certification exam can feel overwhelming, but with the right tools, it becomes an opportunity to build confidence, sharpen your skills, and move one step closer to your goals. At Examzify, we believe that effective exam preparation isn't just about memorization, it's about understanding the material, identifying knowledge gaps, and building the test-taking strategies that lead to success.

This guide was designed to help you do exactly that.

Whether you're preparing for a licensing exam, professional certification, or entry-level qualification, this book offers structured practice to reinforce key concepts. You'll find a wide range of multiple-choice questions, each followed by clear explanations to help you understand not just the right answer, but why it's correct.

The content in this guide is based on real-world exam objectives and aligned with the types of questions and topics commonly found on official tests. It's ideal for learners who want to:

- Practice answering questions under realistic conditions,
- Improve accuracy and speed,
- Review explanations to strengthen weak areas, and
- Approach the exam with greater confidence.

We recommend using this book not as a stand-alone study tool, but alongside other resources like flashcards, textbooks, or hands-on training. For best results, we recommend working through each question, reflecting on the explanation provided, and revisiting the topics that challenge you most.

Remember: successful test preparation isn't about getting every question right the first time, it's about learning from your mistakes and improving over time. Stay focused, trust the process, and know that every page you turn brings you closer to success.

Let's begin.

How to Use This Guide

This guide is designed to help you study more effectively and approach your exam with confidence. Whether you're reviewing for the first time or doing a final refresh, here's how to get the most out of your Examzify study guide:

1. Start with a Diagnostic Review

Skim through the questions to get a sense of what you know and what you need to focus on. Don't worry about getting everything right, your goal is to identify knowledge gaps early.

2. Study in Short, Focused Sessions

Break your study time into manageable blocks (e.g. 30 - 45 minutes). Review a handful of questions, reflect on the explanations, and take breaks to retain information better.

3. Learn from the Explanations

After answering a question, always read the explanation, even if you got it right. It reinforces key points, corrects misunderstandings, and teaches subtle distinctions between similar answers.

4. Track Your Progress

Use bookmarks or notes (if reading digitally) to mark difficult questions. Revisit these regularly and track improvements over time.

5. Simulate the Real Exam

Once you're comfortable, try taking a full set of questions without pausing. Set a timer and simulate test-day conditions to build confidence and time management skills.

6. Repeat and Review

Don't just study once, repetition builds retention. Re-attempt questions after a few days and revisit explanations to reinforce learning.

7. Use Other Tools

Pair this guide with other Examzify tools like flashcards, and digital practice tests to strengthen your preparation across formats.

There's no single right way to study, but consistent, thoughtful effort always wins. Use this guide flexibly — adapt the tips above to fit your pace and learning style. You've got this!

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Questions

- 1. In estate planning, opting for tenancy in common allows which of the following?**
 - A. Automatic sharing of profits**
 - B. Transfer of ownership without consent**
 - C. Division of shares among multiple owners**
 - D. Immediate access to property upon death**
- 2. What must an heir or beneficiary do to reject an inheritance under a will?**
 - A. Accept the inheritance first and then reject it**
 - B. Sign a document in front of three witnesses**
 - C. File a disclaimer**
 - D. Seek a court order**
- 3. What is one of the main reasons for utilizing will substitutes?**
 - A. To ensure more equitable distribution**
 - B. To avoid costs and inconvenience of probate**
 - C. To allow for more extensive control over property management**
 - D. To prevent disputes among heirs**
- 4. What is a "letter of intent" in estate planning?**
 - A. A legally binding contract for asset distribution**
 - B. A document expressing the deceased's wishes regarding assets, but not legally binding**
 - C. A guideline for property management after death**
 - D. A formal will without legal significance**
- 5. Who has the authority to challenge the validity of a will?**
 - A. The executor only**
 - B. Any interested party, such as heirs or beneficiaries**
 - C. A judge exclusively**
 - D. Only the testator**

- 6. What distinguishes joint tenancy from tenancy in common?**
- A. Joint tenancy includes the right of survivorship**
 - B. Tenancy in common allows for equal sharing of profits**
 - C. Joint tenancy can be severed by one party unilaterally**
 - D. Tenancy in common only exists between family members**
- 7. What does "testamentary capacity" refer to?**
- A. The ability to witness a will**
 - B. The legal ability of a person to make or alter a will**
 - C. The requirement for a will to be notarized**
 - D. The necessity of formal legal representation in will creation**
- 8. What is a special needs trust?**
- A. A trust designed to provide for a beneficiary with disabilities without affecting their eligibility for government benefits**
 - B. A trust that ensures all beneficiaries receive equal shares**
 - C. A trust specifically for minors until they reach adulthood**
 - D. A trust that is only recognized in specific states**
- 9. What is a beneficiary designation?**
- A. A written statement specifying who will receive certain assets upon the owner's death**
 - B. A clause that prevents beneficiaries from contesting a will**
 - C. An agreement between two parties regarding asset distribution**
 - D. A formal request to alter a will**
- 10. What is the typical fractional share a surviving spouse receives if there are surviving descendants?**
- A. A quarter of the estate**
 - B. Half or one-third of the estate**
 - C. Three-quarters of the estate**
 - D. The surviving spouse receives nothing**

Answers

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1. C
2. C
3. B
4. B
5. B
6. A
7. B
8. A
9. A
10. B

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Explanations

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1. In estate planning, opting for tenancy in common allows which of the following?

- A. Automatic sharing of profits**
- B. Transfer of ownership without consent**
- C. Division of shares among multiple owners**
- D. Immediate access to property upon death**

Selecting tenancy in common as a form of ownership in estate planning allows for the division of shares among multiple owners. In a tenancy in common arrangement, each co-owner holds a separate and distinct share of the property, which can be of equal or unequal portions. This means that multiple individuals can collectively own a property, but each person's share can be assigned independently, allowing for greater flexibility in estate planning. This structure is particularly beneficial for individuals who wish to have joint ownership with others while still maintaining the ability to pass on their share through their estate. Each tenant in common can freely transfer their interest in the property to another party without needing the consent of the other co-owners. This is a key distinction from joint tenancy, which typically includes a right of survivorship and does not allow for such convenience in ownership transfers. By understanding this arrangement, property owners can make informed decisions about how to structure their estates and what may happen to their shares upon their death or if they wish to sell their interest in the property.

2. What must an heir or beneficiary do to reject an inheritance under a will?

- A. Accept the inheritance first and then reject it**
- B. Sign a document in front of three witnesses**
- C. File a disclaimer**
- D. Seek a court order**

To reject an inheritance under a will, an heir or beneficiary must file a disclaimer. A disclaimer is a formal declaration made by the beneficiary stating their decision not to accept the inheritance. This process allows individuals to avoid potential tax liabilities or other complications associated with the inherited property. The disclaimer typically must be in writing and may need to comply with specific state laws regarding the format and timing of the rejection. By filing a disclaimer, the beneficiary effectively removes themselves from the distribution of that particular asset, allowing it to pass to other beneficiaries as dictated by the will or the laws of intestacy if no will exists. Accepting the inheritance first complicates matters, as the acceptance can often preclude a beneficiary from later rejecting the inheritance. Furthermore, while signing a document in front of witnesses may be relevant for other types of legal transactions, typically, a disclaimer must be filed according to statutory requirements rather than merely witnessed. Seeking a court order is generally unnecessary for a straightforward disclaimer, as this can be accomplished through the appropriate filing without involving the court unless there are disputes or other complications.

3. What is one of the main reasons for utilizing will substitutes?

- A. To ensure more equitable distribution**
- B. To avoid costs and inconvenience of probate**
- C. To allow for more extensive control over property management**
- D. To prevent disputes among heirs**

Utilizing will substitutes primarily serves to avoid the costs and inconvenience associated with the probate process. Probate can be a lengthy and expensive procedure that includes court fees, attorney fees, and other administrative costs. Will substitutes, such as revocable living trusts or payable-on-death accounts, allow assets to transfer directly to beneficiaries upon death without going through probate. This not only accelerates the transfer process but also maintains privacy regarding the deceased's financial affairs, which would otherwise become public in a probate proceeding. By leveraging these substitutes, individuals can simplify estate management and reduce the financial burden on their heirs, making it a compelling reason for their use.

4. What is a "letter of intent" in estate planning?

- A. A legally binding contract for asset distribution**
- B. A document expressing the deceased's wishes regarding assets, but not legally binding**
- C. A guideline for property management after death**
- D. A formal will without legal significance**

A "letter of intent" in estate planning serves as a non-binding document that expresses a deceased person's wishes regarding the distribution of their assets. It allows the individual to communicate intentions, preferences, and important information to heirs and executors. While it informs and guides those responsible for managing the estate, it does not have the legal force of a will or contract, meaning it cannot be enforced in a court of law. This kind of document is particularly useful for clarifying the deceased's expectations, including any specific desires about how certain personal items should be handled or how the executor should manage the estate. Since it is not legally binding, it can be more flexible and informal than a will, allowing for the inclusion of personal sentiments or explanations that might not be suitable in a legal document. Other options describe legal constructs that do not accurately reflect the nature of a letter of intent. For example, a legally binding contract for asset distribution would imply enforceability in law which does not apply to a letter of intent. Similarly, a guideline for property management after death or a formal will without legal significance would misrepresent the role of the letter of intent and its purpose in estate planning.

5. Who has the authority to challenge the validity of a will?

- A. The executor only
- B. Any interested party, such as heirs or beneficiaries**
- C. A judge exclusively
- D. Only the testator

The authority to challenge the validity of a will is held by any interested party, which includes heirs and beneficiaries. An interested party is someone who stands to gain or lose from the probate of the will, meaning they have a legal stake in the outcome. This can consist of individuals named in the will, those who would inherit under intestacy laws if the will were not valid, or creditors of the estate. The ability for interested parties to contest a will plays an essential role in ensuring that the testator's true intentions are upheld and allows for checks and balances within the probate process. This is significant in the legal system because it helps prevent fraud, coercion, or improper execution of the will. In contrast, while an executor may have certain responsibilities to follow the terms of a will, they do not solely possess the authority to contest its validity. A judge would not initiate a challenge but rather preside over disputes brought forth by interested parties regarding the will's validity. The testator, as the individual who created the will, cannot challenge it after death, as they are no longer capable of doing so.

6. What distinguishes joint tenancy from tenancy in common?

- A. Joint tenancy includes the right of survivorship**
- B. Tenancy in common allows for equal sharing of profits
- C. Joint tenancy can be severed by one party unilaterally
- D. Tenancy in common only exists between family members

Joint tenancy is characterized by the right of survivorship, which is a key feature that differentiates it from tenancy in common. In a joint tenancy, when one co-owner dies, their interest in the property automatically passes to the surviving joint tenants, rather than being transferred to heirs or through a will. This right of survivorship provides a streamlined process for the transfer of interests in property and ensures that the surviving tenants retain the full ownership of the property without going through probate. In contrast, tenancy in common does not include this right of survivorship. When a co-owner in a tenancy in common passes away, their share of the property is distributed according to their will or state intestacy laws, independent of the other tenants. This fundamental difference in how ownership and inheritance are handled is central to understanding the distinctions between these two forms of co-ownership. The other options do not capture the defining characteristic of joint tenancy. For example, while it is true that tenancy in common allows for the division of profits, this alone does not distinguish it from joint tenancy. Also, the notion that tenancy in common can only exist between family members is inaccurate; such arrangements can be made between unrelated parties as well. Moreover, joint tenancy can be severed by one party

7. What does "testamentary capacity" refer to?

- A. The ability to witness a will
- B. The legal ability of a person to make or alter a will**
- C. The requirement for a will to be notarized
- D. The necessity of formal legal representation in will creation

Testamentary capacity refers to the legal ability of an individual to create, alter, or revoke a will. This means that the person making the will, known as the testator, must have a clear understanding of the nature and extent of their property, the individuals who are the beneficiaries of that property, and the implications of their decisions regarding the distribution of their assets after death. In assessing testamentary capacity, courts typically look for evidence that the testator understands the concept of making a will, knows who will receive their property, and comprehends the overall effect of their will. This legal capacity is crucial because if a testator is found to lack capacity at the time of creating the will, it may be deemed invalid. In contrast, witnessing a will pertains more to the formalities required for the execution of a will rather than the mental capacity of the person making it. The requirement for a will to be notarized relates to additional formalities that may not be a necessity in all jurisdictions, and formal legal representation, while often helpful in will drafting, is not a legal requirement for testamentary capacity. Therefore, the definition of testamentary capacity specifically addresses the individual's ability to make decisions about their will, which is succinctly captured in the correct choice

8. What is a special needs trust?

- A. A trust designed to provide for a beneficiary with disabilities without affecting their eligibility for government benefits**
- B. A trust that ensures all beneficiaries receive equal shares
- C. A trust specifically for minors until they reach adulthood
- D. A trust that is only recognized in specific states

A special needs trust is specifically structured to benefit individuals with disabilities, allowing them to receive financial support while preserving their eligibility for government benefits such as Medicaid and Supplemental Security Income (SSI). This type of trust is crucial because it provides additional resources for the individual without displacing or reducing their access to essential public assistance. By setting up a special needs trust, the trustee can manage the funds and utilize them for various expenses that enhance the beneficiary's quality of life, such as education, therapy, or personal care, without jeopardizing the individual's government benefits. The other options do not accurately capture the purpose and function of a special needs trust. For instance, a trust that ensures equal shares for all beneficiaries does not address the unique requirements of individuals with disabilities. Similarly, a trust explicitly for minors would not cater specifically to those who may have special needs, as it applies to all minors regardless of their health status. Moreover, claiming that the trust is recognized only in certain states overlooks the fact that while the laws regarding trusts can vary, special needs trusts are recognized broadly and exist under federal guidelines.

9. What is a beneficiary designation?

- A. A written statement specifying who will receive certain assets upon the owner's death**
- B. A clause that prevents beneficiaries from contesting a will**
- C. An agreement between two parties regarding asset distribution**
- D. A formal request to alter a will**

A beneficiary designation is a written statement that specifies who will receive certain assets upon the owner's death. This applies to various types of assets, including life insurance policies, retirement accounts, and trusts. When the asset owner names a beneficiary, that individual or entity is entitled to receive the asset directly, bypassing the probate process. This direct transfer can streamline the distribution of the owner's estate, ensuring that the designated beneficiary receives the intended benefits without delay or complications that might arise through probate proceedings. In contrast, other options provided do not capture the essence of a beneficiary designation. A clause that prevents beneficiaries from contesting a will refers to a no-contest clause, which is different from how assets can be transferred upon an owner's death. An agreement between two parties regarding asset distribution might imply a contract, but it does not explicitly establish who will inherit upon death in the same direct manner as a beneficiary designation. Lastly, a formal request to alter a will is a procedural action rather than a clear declaration of intended recipients of assets, which is the primary function of a beneficiary designation.

10. What is the typical fractional share a surviving spouse receives if there are surviving descendants?

- A. A quarter of the estate**
- B. Half or one-third of the estate**
- C. Three-quarters of the estate**
- D. The surviving spouse receives nothing**

The typical fractional share that a surviving spouse receives when there are surviving descendants is often half or one-third of the estate, depending on jurisdictional laws governing intestate succession. In many states, if a decedent leaves behind both a spouse and children, the surviving spouse usually receives a portion of the estate to ensure that the spouse is supported, while also recognizing the rights of the descendants to inherit. This approach balances the interests of the surviving spouse with those of the children, acknowledging that both have claims to the decedent's property. The exact share can vary by state law; for example, in some jurisdictions, the spouse may receive one-half of the estate, while in others, they may receive one-third or another percentage. Understanding these laws is crucial for estate planning and clarifying inheritance rights, especially in the context of blended families or situations where the estate consists of varied assets.

Next Steps

Congratulations on reaching the final section of this guide. You've taken a meaningful step toward passing your certification exam and advancing your career.

As you continue preparing, remember that consistent practice, review, and self-reflection are key to success. Make time to revisit difficult topics, simulate exam conditions, and track your progress along the way.

If you need help, have suggestions, or want to share feedback, we'd love to hear from you. Reach out to our team at hello@examzify.com.

Or visit your dedicated course page for more study tools and resources:

<https://willsbar.examzify.com>

We wish you the very best on your exam journey. You've got this!