

WILL INFORMATION SHEET

Full Legal Name:

a.k.a.

SS#:

Address:

Phone: Home:

Work:

Mobile:

Occupation:

Date of Birth:

Married Single Divorced Separated Widow(er)

U.S. Citizen? Yes No

Is Spouse a U.S. Citizen? Yes No

Spouse's Legal Name:

a.k.a.

SS#:

Spouse's Occupation:

Date of Birth:

Legal Name and Birth Dates of all your children:

_____	_____
_____	_____
_____	_____
_____	_____

What is the net value of your Estate (include Life Insurance Policies): \$ _____

Do either of you have children by a prior marriage? Yes No

Upon your death, if you are married, do you want your Estate to pass to your Spouse? Yes No

If said Spouse predeceases you and you have a child(ren), do you want everything to go to your children? Yes No

If the Estate is to go to your children, do you want them to share equally? Yes No

If one of your children should precede you in death, do you want their surviving child(ren) (*your grandchildren*), **if any**, to receive his/her share of your Estate? Yes No

If you do not have children, and your spouse predeceases you, how do you want your Estate distributed? _____

Do you want a special provision for personal property? Yes No

Do you want to disinherit a certain heir? Yes No

If Yes, list their name(s):
Give the name and address of person to be appointed Executor (male) or Executrix (female):
Give name and address of Alternate Executor/Executrix:
I suggest that the Executor/Executrix be instructed to use this Office to Probate the Will since we prepared the document and know your wishes. Do you agree? Yes <input type="checkbox"/> No <input type="checkbox"/>
If you have minor children (under the age of 18), give name and address of person(s) appointed as Guardian(s) of your minor children.
Give name and address of an Alternate Guardian(s) of your minor children:
Give the name and address of the person(s) or institution you want to be named as Trustee of your children's assets:
At what age do you want your child(ren) to be able to liquidate the trust? _____ <i>(I recommend not before the age of 24. I always use language that allows the Trust to be used for the child(ren)'s comfortable support and complete education.)</i>

LIVING WILL

I strongly recommend a **"Living Will."** This is a medical document which names an Agent to make medical decisions for you if you are unable to do so. If you would like me to prepare a Living Will for you, please write the name and address and phone number of three people, your spouse being one if you are married, down below:

Name _____	Name _____	Name _____
Relationship _____	Relationship _____	Relationship _____
Address _____	Address _____	Address _____
_____	_____	_____
Phone(H) _____	Phone(H) _____	Phone(H) _____
Phone(W) _____	Phone(W) _____	Phone(W) _____