

Will Worksheet

1. Testator (who the Will is for)

Full name: _____

Address: _____

Telephone: _____

2. Testator's spouse:

Full name: _____

Address: _____

3. How many children (biological and adopted) does Testator have? _____

4. Children's names (first, last & middle. Specify if biological, adopted or step-child):

5. Would you like to disinherit anyone? If so, who?

6. Who would you like to leave your property to?

7. A contingent trust is included in your will. The trust will only be created if, at the time of your death, your beneficiary(ies) have not yet reached a certain age, or they are incapacitated and unable to manage their property. At what age do you think your heirs will be mature enough to

manage their inheritance? _____. If they are younger than the specified age, a trust will be established and a Trustee will manage the property. The trust will terminate once the beneficiary reaches the specified age.

8. Who do you want to serve as Trustee of the Contingent Trust? (this person manages the property held in trust and makes distributions until the trust terminates.)

Name: _____

Address: _____

Phone: _____

Relationship to the Testator: _____

Name (first Successor Trustee, include 2nd if necessary):

Address: _____

Phone: _____

Relationship to the Testator: _____

9. Who would you like to serve as Executor(s) of your will? (the executor administers your estate, pays all of your final bills, closes any accounts, gathers all estate assets and distributes everything to your heirs.)

Name: _____

Address: _____

Phone: _____

Relationship to Testator: _____

Name (First Successor Executor):_____

Address:_____

Phone:_____

Relationship to Testator:_____

Name (Second Successor Executor):_____

Address:_____

Phone:_____

Relationship to Testator:_____

10. Who would you like to serve as Guardian of your children in the event you and your husband are both deceased? (the guardian will have custody of your children until their 18th birthday)

Name:_____

Address:_____

Phone:_____

Relationship to Testator:_____

Name (Successor Guardian of the Person):_____

Address:_____

Phone:_____

Relationship to Testator:_____

11. Any special instructions or concerns:

Your Will is an important legal document. The original should be kept in a safe place so it will not get lost or harmed by fire or weather, such as in a fireproof safe or a safe-deposit box.

You should leave readily available instructions for your executor(s) regarding the whereabouts of the original will. Specifically, you may want to include the following: (1) The exact location of the will. (2) Complete instructions for the burial/cremation (veterans may consider being buried in national cemeteries). (3) Exhaustive listing of friends, relatives, and others who should be contacted upon your death. (4) The exact location of all important documents, such as real estate deeds, divorce papers, birth certificate, any other legal documents and records. (5) Any information related to membership in societies, lodges, or other such organizations (Freemasons, for example). Many of them offer death benefits for named beneficiaries. (6) Where documents related to life insurance may be found, name of insurer(s), policy number(s), etc. (7) All bank account information, including the names of banks and account numbers. (8) A listing of any U.S. Savings Bonds (include names, denominations, and serial numbers). (9) A listing of any stocks or bonds (and where they can be found). (10) Any pension plan information. (11) Income tax returns from the past few years. (12) Location of any outstanding or recurring bills, plus a list of any outstanding personal debts. (13) Where bills and records of payment are located. (14) Any large gifts that you have given in the past few years. The content of any letter of instructions will vary according to each individual's unique needs. The main goal is to help the executor and your beneficiaries as much as possible.

Make it a point to review your will on an annual basis. You should contact an attorney if you need to update your will or make revisions. **DO NOT WRITE ON YOUR WILL OR TRY TO REVISE IT YOURSELF.** Wills are important legal documents, care must be taken to insure the revisions are done properly.

Client

Date