

1. Person(s) Making Will

Name _____ Date of Birth: _____
U.S. Citizen? Yes ___ No ___
Spouse Name _____ Date of Birth: _____
U.S. Citizen? Yes ___ No ___
Street Address _____ Apt _____ County _____
City _____ State _____ Zip _____
State of Residence _____ Telephone Number _____ Cell/Husband: _____ Cell:/ Wife _____
Home Number: _____

2. Marriage

a. Have you and your spouse signed a Premarital Agreement? Yes ___ No ___
If you have, please bring a copy of it to the interview.
b. Have you or your spouse been divorced? Yes ___ No ___
If so, please bring a copy of the divorce decree to the interview.

3. Children

Please **list ALL your children**, including deceased children, children born out of wedlock, and children you wish to omit from your estate plan.

<u>Name of Child</u>	<u>Date of Birth</u>	<u>Address</u>	<u>Child of</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Identify any child who is not a natural or adopted child of both you and your spouse.

4. Personal Representative.

Who should be Personal Representative ("executor") of your estate? A Personal Representative is responsible for probating your will, paying your debts, collecting your assets, and settling your estate.

Name: _____
Relationship to you: _____
Address: _____
Alternate Personal Representative: _____
Relationship to you: _____
Address: _____

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5. Financial Inventory

Use approximate values under each person showing ownership of each asset. BRING SUPPORTING DATA FOR EACH ASSET, i.e. bank statements, retirement reports, stock and bond account reports, etc. For Account Numbers, List the Last 4 Digits of Each Account Only.

ASSETS	HUSBAND	WIFE	JOINT
Home			
Other Real Estate			
Checking Account			
Savings Account			
Money Market Account			
Automobile			
Personal Property			
Stocks & Bonds			
Closely Held Business Interest			
Life Insurance (Face):			
On husband's life			
On wife's life			
Retirement Accounts:			
IRA			
Pension			
Profit Sharing/401k			

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Other Assets:	HUSBAND	WIFE	JOINT
TOTAL ASSETS			

LIABILITIES	HUSBAND	WIFE	JOINT
Home Mortgage			
Other Mortgages			
Debts To Family Members			
Other Debts (describe):			
TOTAL LIABILITIES			
NET OF ASSETS LESS LIABILITIES			

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6. Beneficiary Designations:

a. Life Insurance:

Policy Name/Number	Face Value	Owner	Insured	Beneficiary
1.				
2.				
3.				
4.				
5.				

b. Retirement Plans. **Please list your retirement plans/IRAs; value of each and the beneficiary of each here:**

c. Does your retirement plan have a death benefit? **Yes** ____ **No** _____. If so, who is the named beneficiary?

List Beneficiaries Here:

7. Personal Property

Describe and give a value of any items of **substantial value**, such as automobiles, works of art, jewelry, etc. Be sure to **include any items listed on an insurance rider.**

Description

Approximate Value

Personal Property

Automobiles

Collectibles

Jewelry

Boats/Airplanes

8. Bequests You Desire To State In Your Will

Describe who you wish to gift your property under your Will (i.e. spouse), and a successor should that individual not survive you (i.e. children).

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Predeceased Child. If any child should predecease parent, should his/her share pass through to his/her children? If so, please indicate grandchildren, if any.

Specific Gifts. Do you wish to make any specific bequests to charities or individuals? **Yes/No (Circle One.) Explain:**

No Family Survives. How should your estate be distributed if your spouse and/or children do not survive you? (For example: family, charity, etc.) **List Here:**

If no Children. If you do not have children, to whom should your estate pass (beyond a spouse, if any)? **List Here:**

Current Will. Do you now have a will or revocable trust? **Yes/No (Circle One.)** If so, bring a copy to the interview meeting.

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