

JOHNNY W. THOMAS, LAW OFFICE, P.C.
SIMPLE WILL
INTERVIEW WORKSHEET

1. Client Name: _____

2. Spouse's Name: _____

3. Address: _____

4. City, State & Zip: _____

5. Home # _____ **Wk#** _____ **Cell#** _____

6. Names of Children:

Name: _____ **Age:** _____

Name: _____ **Age:** _____

Name: _____ **Age:** _____

Name: _____ **Age:** _____

Name: _____ **Age:** _____

Name: _____ **Age:** _____

7. Do you wish to leave your entire estate to your spouse? Yes _____ **No** _____

If not then to whom: _____

8. Do you wish to leave your entire estate to your children if your spouse predeceases you? Yes _____ **No** _____

If not to all then which ones: _____

9. If the answers to # 8 and # 9 are no, then to whom do you wish to leave your entire estate to? _____

10. Do you have any deceased children? Yes _____ **No** _____

If yes, please state full name of the deceased child and age: _____

Age:

Age:

11. If your spouse and children predecease you, to whom do you wish to leave your estate to?

EXECUTOR/EXECUTRIX

An executor or executrix is a person named by you to administer your estate. It is usually the spouse who is named as the executor or executrix of the estate however, this is not mandatory. The executor or executrix has the duty to settle your estate and distribute your property as designated in your Will.

12. Whom do you wish to be your executor or executrix? Your Spouse? Yes / No

If not your spouse, then whom:

If that person is not able to serve as executor or executrix, then whom would you like as a second alternate?

GUARDIAN

A guardian is a person or persons appointed by you to stand in your place in regards to the raising of your children to their legal majority (presently eighteen years) in the event of the death of both parties.

13. Whom do you wish to be your guardian?

If that person is not able to serve as guardian, then whom would you like as a second alternate?

14.

**NOTICE: THE ABOVE QUESTIONS CONSTITUTE A SIMPLE WILL.
ANYTHING BEYOND THE ABOVE QUESTIONS WILL REQUIRE AN
APPOINTMENT WITH THE ATTORNEY.**
