

SIMPLE WILL INTAKE WORKSHEET

NAME:

ADDRESS:

HOME PHONE:

CELL PHONE:

SPOUSE'S NAME:

DO YOU HAVE CHILDREN:

YES

NO

NAME:

AGE:

DO YOU HAVE ANY DECEASED CHILDREN:

YES

NO

NAME:

AGE ATE DEATH:

BENEFICIARIES

WHO WOULD YOU LIKE TO LEAVE YOUR ENTIRE ESTATE TO?

SPOUSE

CHILDREN IN EQUAL SHARES

OTHER:

IF THIS PERSON(S) PREDECEASES YOU, WHO WOULD YOU LIKE TO LEAVE YOUR ENTIRE ESTATE TO?

SPOUSE

CHILDREN IN EQUAL SHARES

OTHER:

WOULD YOU LIKE TO GIVE SPECIFIC GIFTS? YES NO

How would you like to divide your estate?

EXECUTOR/EXECUTRIX

An executor or executrix is a person named by you to administer your estate. The executor or executrix has the duty to settle your estate and distribute your property as designated in your Will.

WHO WOULD YOU LIKE TO NAME AS EXECUTOR/EXECUTRIX?

NAME:

CURRENT ADDRESS:

IF THIS PERSON PREDECEASES YOU, FAILS TO QUALIFY, OR REFUSES,

WHO WOULD YOU LIKE TO NAME AS AN ALTERNATE EXECUTOR?

NAME:

CURRENT ADDRESS:

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.

WHO WOULD YOU LIKE TO NAME AS GUARDIAN?

NAME:

CURRENT ADDRESS:

IF THIS PERSON PREDECEASES YOU, FAILS TO QUALIFY, OR REFUSES,
WHO WOULD YOU LIKE TO NAME AS AN ALTERNATE GUARDIAN?

NAME:

CURRENT ADDRESS: