

WILL WORKSHEET
10th Support Group Legal Assistance Office
Building 218, Room 219 (644-4332)

Note: Please fill out this form completely before your appointment with an attorney.

	First Name	Middle Name	Last Name
Name			
Your Spouse's Name			
Children's Names			

1. Do you want to leave any Special Gifts (wedding ring, baseball card collection) to anyone?
2. Who do you want to receive the rest of your estate (after special gifts, if any, are made)?

Full Name	Relationship to you	Percentage

3. List your alternate beneficiaries if the person in #7 does not survive you.

Full Name	Relationship to you	Percentage

4. List your second alternate beneficiaries if the person or people in #8 do not survive you.

Full Name	Relationship to you	Percentage

5. Are there any relatives that you specifically do not want to receive anything from your estate?

Full Name	Relationship to you

6. Personal Representative/Executor: This person manages the probate of your estate:

	Full Name	Relationship to you
1 st Choice		
2 nd Choice		
3 rd Choice		

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7. Guardian of your children?

	Full Name	Relationship to you
1 st Choice		
2 nd Choice		
3 rd Choice		
4 th Choice		

8. What age do you want your children to receive their property (check one)?
 18; 21; 25; ½ at 21 and ½ at 25; 1/3 at 21, 1/3 at 25, and 1/3 at 30; other:

9. If you decide (after speaking to an attorney) that you want to set up a trust for your children, who would you want the trustee (manager of the trust assets) to be:

	Full Name	Relationship to you
1 st Choice		
2 nd Choice		
3 rd Choice		
4 th Choice		

In which state are you registered to vote?	
Which state issued your driver's license?	
In which state is your car registered?	
In which state(s) do you own real estate?	
In which state(s) do you file tax returns?	
How many biological children do you have?	
How many step-children do you have?	

	Yes	No	N/A
Are you a United States citizen?			
Is your spouse a United States citizen?			
Do you have a will or trust now?			
Are you expecting to receive property or money from a gift, inheritance, or lawsuit?			
Have you ever lived in a community property state?			
Do you have a pre-nuptial or post-nuptial agreement?			
Do you have a divorce decree that mentions pensions or insurance?			
Do you or your spouse have any life insurance policies?			
Do you or your spouse own any other titled property such as a car, boat, etc?			
Do you or your spouse have any checking accounts or interest bearing accounts?			
Do you or your spouse own any investments such as stocks or mutual funds			
Do you or your spouse have any profit sharing, IRAs, or pension plans?			
Does anyone owe you money?			
Do you own a business or any special items of value?			
Do you want a Healthcare Power of Attorney and/or a Living Will?			