

WILL WORKSHEET

PRIVACY ACT STATEMENT: Information is solicited in accordance with Title 10, U.S. Code, Section 8072, and will be used to prepare a will. Providing information is voluntary; however, failure to provide information will prohibit the preparation of a will.

WHAT IS A WILL? A will is a legal document that states your desires concerning what will happen to your property after your death. A will also contains other specific directions from you concerning who is to implement your instructions and, perhaps, who will care for any minor children you may leave behind.

WHY SHOULD I MAKE A WILL? If you die without a valid will, the laws of your domicile or state of legal residence determine what happens to your property, and your wishes usually will not be considered.

IS ALL OF MY PROPERTY CONTROLLED BY MY WILL WHEN I DIE? No! For example, proceeds of life insurance policies (including SGLI) are distributed as you designated in the insurance policy, and property that you own jointly with another person will, normally, go to the other joint owner. Likewise, certain bank accounts which are payable on death go directly to the beneficiary.

CLIENT INFORMATION

FULL NAME (FIRST, MIDDLE, LAST): _____

DOMICILE (STATE OF LEGAL RESIDENCE): _____

MARITAL STATUS:

- _____ Single and never previously married
- _____ Married once and spouse is alive
- _____ Married and spouse is alive, but also married before
- _____ Widow/Widower and now single
- _____ Previously married, but now divorced and single

FULL NAME OF SPOUSE: _____

IS TOTAL VALUE OF ESTATE (INCLUDING LIFE INSURANCE) GREATER THAN \$1,000,000? YES NO

FULL NAMES OF CHILDREN (specify if adopted or stepchild):

<u>Name</u>	<u>M/F</u>	<u>Age</u>	<u>Marital Status</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

DO YOU WANT ADOPTED CHILDREN OR STEPCHILDREN TO BE EXPRESSLY INCLUDED _____, OR EXPRESSLY EXCLUDED _____, OR WILL IS TO BE SILENT _____?

DISTRIBUTION OF PROPERTY

WHAT CAN I DO WITH MY PROPERTY? You can dispose of your property any way you wish, although state law may give your spouse and/or your children a right to part of your property regardless of your desire. Many married persons leave all their property to their spouse and, if their spouse does not outlive them, then to their children. The provisions of your will DO NOT control life insurance proceeds, including SGLI, nor any other property that passes to beneficiaries outside of the probate proceeding.

CAN I GIVE SPECIFIC THINGS TO SPECIFIC PEOPLE? Yes, these are called specific bequests and you may make them by fully describing what you want to give and the person who is to receive it. However, you should be careful about specific bequests. If you dispose of the property that you describe, or if there is any doubt about the exact property that you have described in your will, you may be creating difficulties for your personal representative.

IS A FAMILY BUSINESS OR FARM TO BE DISPOSED OF UNDER THIS WILL?
YES _____ NO _____. IF SO, PLEASE DESCRIBE:

DO YOU OWN ANY REAL ESTATE WHICH IS TO BE DISPOSED OF UNDER THIS WILL?
YES _____ NO _____. If yes, how is real estate to be devised?

_____ all to your spouse
_____ as provided with regard to the residuary estate
_____ other (describe disposition): _____

HOW DO YOU WANT TO DISPOSE OF YOUR TANGIBLE PERSONAL PROPERTY? (Tangible personal property is property owned by you at the time of death (except cash) including, without limitation, personal effects, household goods, clothing, jewelry, furniture, vehicles, etc.)

- all to your spouse
- as provided with regard to the residuary estate
- other (describe disposition): _____

DO YOU WANT TO MAKE ANY CASH REQUESTS OR SPECIFIC REQUESTS? (If so, enter description of property and the person who is to receive it):

RESIDUARY ESTATE: HOW DO YOU WANT TO DISPOSE OF YOUR REMAINING PROPERTY? (Called your residuary estate, this is the property (usually cash and real estate) remaining in your estate after the tangible personal property has been disposed of and specific bequests made.)

- to your spouse outright, if she survives you
 - if spouse predeceases, to your children per stirpes. (Per stirpes is a method of distribution whereby the descendants of your child receive that child's share of the estate if your child has died before the estate is distributed)
- a minimum bequest to spouse (disinheriting spouse to the extent permitted by law) [balance to ___ your children, or to: _____]
- to your children per stirpes (if not currently married)
- to one beneficiary: _____
- to more than one beneficiary, in ___ equal or ___ unequal shares, as follows: _____

DO YOU WANT TO DESIGNATE ALTERNATE BENEFICIARIES: The alternate beneficiaries may be one or more individuals, or groups of people, and you can designate a series of alternate beneficiaries: _____

IF ANY BENEFICIARIES ARE MINORS, WHAT AGE MUST THEY ATTAIN TO RECEIVE A BEQUEST OUTRIGHT? 18 21

PERSONAL REPRESENTATIVE

WHAT IS A PERSONAL REPRESENTATIVE? A personal representative, or executor, is a person that you name in your will to carry out your desires, as expressed in your will, and to settle your estate. Settlement includes paying, from your estate, any taxes and debts you may owe. Many married people name their spouse as their personal representative. Your personal representative will have an important role, so choose him or her with care, and discuss the matter with them. Be sure that the person you name is one that you trust and have confidence in.

WHO DO YOU WANT TO APPOINT AS YOUR PERSONAL REPRESENTATIVE/EXECUTOR? (ENTER NAMES AND RELATIONSHIPS)

Executor: _____
Successor Executor: _____

GUARDIAN

WHO IS A GUARDIAN? A legal guardian is the person who will act as the parent for any of your children who are minors when you die. Normally, if your spouse survives you, he or she becomes the children's guardian if he or she is the biological or adoptive parent of the children. However, it is recommended that you name a guardian and an alternate guardian in the event that both you and your spouse die. If you or your spouse have children not born of your current marriage, you should discuss the situation in detail with an attorney to determine the most appropriate way to provide for the children. Normally, a guardian of the person will also be named as guardian of the child's property; however, a different guardian of the property may be named if you have good reason to do so.

IN THE EVENT THAT THE OTHER PARENT OF YOUR MINOR CHILDREN DOES NOT SURVIVE YOU, WHO DO YOU WISH TO APPOINT AS GUARDIAN? (ENTER NAMES AND RELATIONSHIPS)

Guardian of person: _____
Successor guardian of person: _____
Guardian of property (if different): _____
