

Simple Will Information Sheet

(See page 5 before completing)

Personal Information

Your name: _____

Date of Birth: _____

Address: _____

County: _____

Spouse's name: _____

Your children from *current* marriage:

1st Child Full Name: _____

Male Female

Date of Birth: _____

2nd Child Full Name: _____

Male Female

Date of Birth: _____

3rd Child Full Name: _____

Male Female

Date of Birth: _____

4th Child Full Name: _____

Male Female

Date of Birth: _____

5th Child Full Name: _____

Male Female

Date of Birth: _____

If your spouse has children from a previous marriage (your step-children) do you wish to treat them as your own for purposes of this will? _____ If so, please list those children here:

1st Child Full Name: _____

Male Female

Date of Birth: _____

2nd Child Full Name: _____
Male Female
Date of Birth: _____

3rd Child Full Name: _____
Male Female
Date of Birth: _____

4th Child Full Name: _____
Male Female
Date of Birth: _____

5th Child Full Name: _____
Male Female
Date of Birth: _____

Your children from any *previous* marriage or relationship you may have had:

1st Child Full Name: _____
Male Female
Date of Birth: _____

2nd Child Full Name: _____
Male Female
Date of Birth: _____

3rd Child Full Name: _____
Male Female
Date of Birth: _____

- If you have other children from more than one previous marriage/relationship please include that information in an email or notify this office when you submit the form.
- Names of *any* children who may have predeceased you:
- Do you wish to include any *after born* children as beneficiaries (i.e. any children born after the will has been executed)?
Yes No
- Names of any children who you may wish to *exclude* as a beneficiary:

Executor = person you wish to handle your estate and make sure the Will is probated and adhered to.

Executor Information: If the 1st executor predeceases you, fails to qualify, or refuses then 2nd executor will be appointed.

1st Executor Full Name: _____

Relationship: _____

Alternate Executor Full Name: _____

Relationship _____

Guardian = person that children will live with in the event you and your spouse are no longer living.

Guardian Information: If you have any minor children, indicate whom you would want to be guardian if there is a need for a guardian. (if a couple – names of both guardians)

Name: _____

Relationship: _____

Alternate Guardian Name: _____

Relationship: _____

Trustee = Person in charge of children's belongings/finances if children were left property or money.

Trustee Information: If you have any minor children, indicate whom you wish to appoint as trustee of the minor children's property if there is a need for a guardian.

Name: _____

Relationship: _____

Alternate Trustee (if any)

Name: _____

Relationship: _____

- If a trustee is named for your minor children at what age would you wish the child to become responsible for their affairs as they relate to the estate? (i.e. 18, 21, 25, 30, etc.)
_____ years of age.
- Do you have any children with special needs that should be provided for by a trustee?

Name: _____

Date of birth: _____

Please write yes or no if any of the following pertain to you:

_____ Have funeral, burial or cremation arrangements been made? If so, briefly describe the arrangements and if to be buried, where:

_____ Do you wish to provide a no-contest clause? (No Contest means anyone listed in the Will cannot sue others listed - except for improper handling.)

- In the event that your spouse predeceases you and you have no living children, to whom do you wish your property to be distributed?

Your heirs (mother, father, siblings, etc.)

Your spouse's heirs

Half to your heirs and half to your spouse's heirs

- Do either you or your spouse have another name by which you sometimes go by? If so, state the name: _____

The following information may be of help before completing the Will Intake Form:

SIMPLE WILL DEFINED – Entire Estate is left to Spouse. If Spouse predeceases then entire estate is left to children/heirs.

If you have other beneficiaries, if you want to list special bequests leaving certain property to certain people, that is not a Simple Will and there is another form for you to fill out listed as: Will Intake

- *Unless otherwise stated* in the information that you provide, if you are married when you die and your spouse survives you the spouse will be the sole beneficiary of your estate. If your spouse has predeceased you your descendants will be your beneficiaries. The Will defines describes *descendants* as the lineal blood descendants of the first, second or any other degree of the ancestor designated (and also includes legally adopted children). This means that those of your children (if any) that you have noted in the Will would get equal shares of your estate. If a child has predeceased you then their children (your grandchildren) would be entitled to the parent's share of the estate. If the predeceased child had no children then that child's portion of the estate would be subdivided among their remaining siblings. This is what is called, in legalize, *per stirpes*.
- If you plan to exclude a child from being a beneficiary you still need to note them in the Will but state that they are being intentionally excluded.
- If you have named beneficiaries on life insurance policies, pensions, bank accounts, etc., those are treated separately from any property that is to be distributed per terms of a Will – Simple or otherwise.

POWER OF ATTORNEY

Designee - Name of person you are giving POA rights to:

Designee's Address:

Relationship: _____

Phone Number: _____

Name of Alternate Designee:

Address:

Relationship: _____

Phone Number: _____

Do you wish this Power of Attorney to become effective:
immediately
or
upon disability?

MEDICAL POWER OF ATTORNEY

Name of Designee:

Designee's Address:

Relationship: _____

Phone Number: _____

Alternate Designee:

Address:

Relationship: _____

Phone Number: _____