

WILL INTAKE

A will can leave property to family, friends or charities; name a guardian to care for your young children; appoint an adult to manage property you leave to young people; name an executor and/or alternates; forgive debts others owe to you; specify how your debts and taxes will be paid. The following questions will address each of these issues so that a will can be prepared that accurately expresses your intentions. Feel free to attach pages if you feel that any of the questions need further explanation.

Full legal name: _____ M / F

Aliases used (variations of full name; maiden name; etc.): _____

Social Security # (optional, but may help find records after death): _____

Main legal residence: _____

Marital status: _____ Spouse's full name: _____

Children's full names, gender, birthdate, residence: _____

Grandchildren's full names, gender, birthdate, residence: _____

Personal guardian for minor children: _____

Alternate, if desired: _____

Property guardian for minor children: _____

Alternate, if desired: _____

Property management options: _____ UTMA _____ Child's trust

If child's trust, state termination age, trustee, and alternate: _____

Explain your choice, if desired: _____

Distribution of property (all to spouse or child; or list specific items and beneficiary's name): _____

Executor's full name: _____

Alternate, if desired: _____

Miscellaneous:

Would you like to forgive any debts? _____

Would you like to specify which property should be used to pay any debts and/or taxes? _____

If you would like to include a list of names and addresses of those people listed in your will, to help the executor locate these people, please attach this information to the intake form.