

WILL / TRUST INFORMATION SHEET

Date: _____ Phone # _____ Email: _____

The following information is needed to prepare a first draft of your Will or Trust :

(1) Your Name: _____
Full Legal Name

(2) Spouse's Name: _____
Full Legal Name

(3) Name of Children and Their Date of Birth:

Full Legal Name/Date of Birth

Full Legal Name/Date of Birth

Full Legal Name/Date of Birth

(4) Name of Personal Representative (first choice and second choice):

It will be this individual's job to see that your will is probated according to your wishes. First choice is generally your spouse, and second choice is another person you would trust with all of your property.

First Choice - _____
Name and Resident City

Second Choice - _____
Name and Resident City

(5) Name of Guardian/Co-Guardians (first choice and second choice):

This person/persons would be responsible for parenting your minor children (under 19 years of age). Many people will name a trusted couple as “co-guardians”.

First Choice - _____
Spouse

Second Choice - _____
Name and Resident City

(6) Testamentary Trust for Children:

A testamentary trust pays for the care and maintenance of your minor children, and provides for a distribution to your children at a certain age. While some people prefer a “lump sum” payoff to their children when they reach a certain age, most prefer several payoffs to their children at different ages.

Age or Ages of Disbursement: _____

“Lump Sum: or “Partial” Payoff: _____

(7) Name of Trustee (first choice and second choice):

This person, who sometimes also serves as a guardian, is responsible for saving, maintaining, and disbursing any funds left in a Testamentary trust for you children. The “guardian” is responsible for a child’s person, and a “trustee” is responsible for a child’s money until it is dispersed.

First Choice - _____
Name and Resident City

Second Choice - _____
Name and Resident City

(8) Name of Devisee(s):

The names of the people who will inherit your estate and their fractional share.

Name & Resident City

Fractional Share

Name & Resident City

Fractional Share

Name & Resident City

Fractional Share

Name & Resident City

Fractional Share

(9) Name of Alternate Devisee:

If Devisee(s) do(es) not survive you, this person or persons inherits your estate.

First Choice and Fractional Share:

Name and Resident City

Fractional Share

Second Choice and Fractional Share:

Name and Resident City

Fractional Share

(10) Special Provisions:

Any other particular provision which you would like incorporated into your will.
(Examples: Other than equal split to children; specific requests, etc.)

(11) Powers of Attorney:

a) Durable Power of Attorney

First Choice: _____

Second Choice: _____

b) Durable Power of Attorney for Healthcare & Living Will

First Choice: _____

Second Choice: _____

(12) Inventory (Only for Revocable Trust)

a) Real Estate _____

b) Vehicles _____

c) Farm Equipment _____

d) Cattle Brand _____

e) Securities & Certificate of Deposits _____

f) Bank Accounts _____

g) Collectables _____

h) Insurance _____

i) Home Furnishings _____
