

WILL WORKSHEET

6 AMW/JA

Call (813) 828-4422 for Appointment

**PLEASE NOTE: IF YOU HAVE A THURSDAY WILL APPOINTMENT,
THIS IS A 1 ½ HOUR APPOINTMENT**

Name (Last, First, Middle): _____ Sex: M ___ F ___

Home Address: _____

Date: _____ State of Legal Residence: _____

Is the total value of your estate (combined estate if married) including investments, insurance policies, property, etc., over \$1,000,000? Yes: ___ No: ___ If YES, PLEASE SEE OR PHONE THE APPOINTMENT DESK

Telephone: Home: () _____ Work: () _____

Branch of Service/Rank: _____ STATUS: ___AD ___AD Dep ___Retired ___Dep of Retired

Marital Status: ___ Single (Never Married) ___ Single (Divorced) ___ Single (Widowed)
___ Married (Only Once) ___ Married (More than Once)

Full Name of Spouse _____

Children: (Including Natural, Step and Adopted) How many children do you have? _____

Name(s)	Ages (include adults)	Natural	Stepchild	Adopted	Treat as Natural (Yes or No)

If you have more children list them on a separate sheet of paper or let your attorney know.

Do You Own or Have an Interest In a Business? ___Yes ___No

Do You Own a House or Land? ___Yes ___No (Florida residents ask the attorney about the Homestead Act)

Who would you like to be your Personal Representative (Executor)?

Name/Address

Relationship

Primary _____

Alternate _____

PLEASE COMPLETE REVERSE SIDE →

PLEASE ASK YOUR ATTORNEY TO EXPLAIN IN DETAIL ANY TERMS OR CONDITIONS YOU DO NOT UNDERSTAND, i.e., Personal Representative (executor), "per stirpes" or "per capita", Final Beneficiary Clause, wording of disinheritances, etc.

Who is to be the Guardian of minor children if your spouse is not living at your death?

Name/Address

Relationship

Primary _____

Alternate _____

To whom do you wish to leave your estate?

_____ To your spouse, if they survive you, then to your children in equal shares (**PER STIRPES OR PER CAPITA**)

OR

_____ Other beneficiaries (list them below)

Primary beneficiary/beneficiaries Name and Relationship to you

Alternate beneficiary/beneficiaries Name and Relationship to you

If a minor inherits under your will, at what age should they control their money?

_____ 18 _____ 21 (Over 21 requires an express trust which is not available at this office)

Do you want to have a *Personal Property Memorandum* (also known as a Separate Writing Clause) in your will? (A Personal Property Memorandum allows you to make certain specific bequests such as jewelry, paintings, etc., to the person(s) of your choice, but this form cannot be used to bequest cash, intangible stocks, bonds or real property). (Only for AK, AR, AZ, CO, DE, FL, HI, ID, IA, KS, ME, MI, MN, MO, MT, NE, NJ, NM, SC, UT, WA, WY)

_____ Yes _____ No

Do you wish to make a Specific Gift or Cash bequest to someone? _____ Yes _____ No

Name of Individual

Gift(s) to be given

Do you want someone who would normally receive a portion of your estate to be disinherited in your will? (Someone like a child, grandchild, spouse, sibling, etc.)

_____ Yes _____ No If yes: Name and Relationship _____

THIS SECTION IS FOR LEGAL ASSISTANCE PERSONNEL ONLY

Atty: _____ Entered in DL: _____ Doc Name & Index #: _____

Execution Date: _____