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WILL INFORMATION SHEET

Legal Name _____

Address _____

County _____

Telephone _____

E-Mail: _____

1. Family Information:

a. Spouse's Legal Name _____

b. Children - Legal Name(s) and Birthday(s)

1. _____

2. _____

3. _____

4. _____

2. Guardian - If both you and your spouse die, who should be named to take physical care of your children (Name and Address)

a. _____

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b. (Alternate) _____

3. Conservator - If both you and your spouse die, who should be named to take care of the day to day expenses for the children – usually the same person as the Guardian (Name and Address)

a. _____

b. (Alternate) _____

4. Personal Representative - Who should be named as the person to execute your will (Name and Address)

a. _____

b. (Alternate) _____

5. Trustee - Who should be named to be in charge of any Trust in your will - (Name and Address)

a. _____

b. (Alternate) _____

6. Assets

a. What is a realistic estimate of the value of your assets? You must include the value of all life insurance on your life, the full value of any real estate, bank accounts, stock, bonds, pensions and retirement accounts, businesses and all other assets, including the fair market value of all furnishings, etc. _____

b. What is a realistic estimate of the value of your spouse's assets? _____

7. Specific beneficiaries and specific wills

8. Other information that you believe should be considered in drafting your will.
