

Will Worksheet

1. Do you know the age and current addresses of ALL your children?
2. If your children are under age 18, have you determined who will act as their custodian in the event of your death or in the event of both you and your spouse's death?
3. Have you obtained the consent of that person?
4. Do you know that person's full name and address?
5. If the person you have chosen to serve as custodian is not able to care for your children or refuses, have you chosen an alternative?
6. Do you know that person's full name and address?
7. Have you made a list of all the real estate owned by you in whole or in part?
8. Do you know how your real estate held (joint tenancy, tenancy in common, sole ownership)?
9. Have you made a list of all savings accounts, pensions, profit sharing interest, certificates of deposits, stocks, bonds and/or securities owned by you in whole or part?
10. Do you know the cash surrender value on your life insurance policy?
11. Do you know its value upon death?
12. Do you know the cash surrender value on your spouses life insurance policy?
13. Do you know its value upon death?
14. Do you know the value of your retirement benefits and/or annuities?
15. Do you have retirement or death benefits from sources other than your employment?

16. Generally, most married people determine that upon their death their property should pass:
 1. To surviving spouse
 2. If their spouse predeceases them, their property will be divided in equal shares among all their living children.
 3. If their spouse and one of their children predecease them, that child's share in their estate is distributed to that child's children (their grandchildren) in equal shares.

If this scenario applies to you and you do not wish your property to pass in that manner, do you have an alternative plan?

17. Most unmarried persons with children determine that upon their death, their property passes:
 1. In equal shares to all their living children
 2. If one or more of their children predecease them, that child's share in their estate is distributed to that child's children (their grandchildren) in equal shares.

If you are unmarried and presently have no children, have you determined who you wish to receive your property?

18. Do you know their full name(s) and address(es) ?
19. If the person you have chosen happens to predecease you, have you chosen an alternative beneficiary?
20. Do you know their full name(s) and address(es)?
21. Do you have any special provisions for family heirlooms, jewelry or other items of special value, to be passed on to friends or relatives?
22. Have you determined whom you want to be in charge of administering your estate, paying taxes and other debts, marshalling, preserving, and managing estate assets and property is called a personal representative?
23. Do you know that person's full name and address?
24. Is there any other information that you think would aid your Provider Lawyer in preparing your standard Will?