



## ESTATE INFORMATION FORM

### WILL

1. Your name (how you would like for it to appear): \_\_\_\_\_
2. City and state of residency: \_\_\_\_\_
3. Spouse's full name: \_\_\_\_\_
4. Children

Full Name	City/State of Residency (if 18 and over)	Date of Birth (if under 18)

5. If you have minor children who will be receiving your property, you should consider a trustee who will maintain their property until they are able to take:

\_\_\_\_\_

- a. It is highly suggested that you consider an alternate in case that person is unable to fulfill the position. \_\_\_\_\_

b. At what age or at what event would you want your minor children to receive their inheritance? \_\_\_\_\_

6. If you have minor children, you could consider a guardian until they attain the age of 18:

\_\_\_\_\_

a. It is highly suggested that you consider an alternate in case that person is unable to fulfill the position. \_\_\_\_\_

7. Who would you like to name as your executor (this is the person who ensures your property will be distributed according to your wishes)? Please give their full name and the city and state in which they reside: \_\_\_\_\_

a. It is highly suggested that you consider an alternate in case that person is unable to fulfill the position. \_\_\_\_\_

8. Would you like to give anything specifically to an individual or a group of people? If so, you have the option of listing those gifts in the will **OR** you can create a legal list (a list that is attached to the will that you can write in the gifts even after the will is signed).<sup>1</sup>

Full Name of Beneficiary	City/State of Residency	Gift

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<sup>1</sup> Keep in mind that life insurance policies, stocks and bonds cannot be included in wills. Those are separate contracts and those beneficiaries must be given to the companies who hold such investments.

9. If your answer to Question #8 was no, you can give all that you have to an individual or a group of people. Who would you like for your entire estate to go to?

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a. It is highly suggested that you consider an alternate in case that person/group is unable or unwilling to receive your property. (You can name more than one)

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10. If your answer to Question #8 was yes and you gave away certain pieces of your property, who would you like to receive the remainder of your property? (It can be a person or a group of people. If more than one person, please indicate the percentage you would like each person to take)

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a. It is highly suggested that you consider an alternate in case that person/group is unable or unwilling to receive your property. (You can name more than one)

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POWER OF ATTORNEY

1. Who would you like to name as your Attorney in Fact? List their name and city/state of residency.

\_\_\_\_\_

a. It is highly suggested that you consider an alternate in case that person is unable to fulfill the position. \_\_\_\_\_

2. Do you need this Power of Attorney to be effective **immediately** or only in the event you become **disabled/incapacitated**? \_\_\_\_\_

3. Do you require a Power of Attorney for limited purposes (i.e. – to last for only a certain period of time, only for a specific real estate transaction, for a child): \_\_\_\_\_

a. If so, please explain:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## ADVANCE MEDICAL DIRECTIVE

1. Who would you like to name as your Agent? List their name and city/state of residency.

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- a. It is highly suggested that you consider an alternate in case that person is unable to fulfill the position. \_\_\_\_\_

2. Do you wish to be an organ donor? \_\_\_\_\_

3. Do you wish to be cremated? \_\_\_\_\_

4. If an attending physician determines you have a terminal condition, would you like to be resuscitated or not? \_\_\_\_\_