

INFORMATION SHEET FOR LAST WILL AND TESTAMENT

(Please Print)

Date: _____

CLIENT/ TESTATOR INFORMATION

Name: _____ Maiden Name: _____
Street Address: _____
Home Phone: _____
Business Phone: _____
Mailing Address: _____ Cell Phone: _____
(if different from Street) _____
Email: _____
Texas DL Number: _____ Exp. Date: _____
Social Security No: _____ Divorced : Y/N _____

SPOUSE INFORMATION

Name: _____ Maiden Name: _____
Street Address: _____ Business Phone: _____
Cell Phone: _____
Email: _____ Home Phone: _____
Texas DL Number: _____ Exp. Date: _____
Social Security No: _____

CHILDREN / STEP CHILDREN (if applicable)

Please list children/ step children/ or adopted children:

WILL CONTENTS

Disposition of estate (who you want to receive gifts from your estate):

A. Primary Person(s): _____

B. Alternate Person(s): _____

(Purpose of alternate is in the event that the primary beneficiary does not survive)

Executor:

A. Primary Executor: _____

B. Alternate Executor: _____

Funeral Arrangements: (check which option you have or would like to have)

Provide for in this will

Do not provide for in this will

I will or have arranged for pre-paid funeral

Do you want to include an "In Terrorem Clause" which prohibits any beneficiary from contesting the will? _____

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