

Will Intake

Date: _____

Name (as you would like it listed in your Will): _____

Spouse's name, if applicable, to be listed in Will: _____

Address: _____ City/State: _____

Phone: _____ e-mail: _____

Marital Status: Single Married Divorced Widowed Registered Domestic Partner

US Citizen: Yes No Spouse US Citizen: Yes No DOB: ___/___/___ Spouse DOB: ___/___/___

Referred by: _____

Children: You must mention *all* children in your will, whether or not you wish them to receive anything.
Please note if a child is a step-child to one of the parents.

<u>Name of Child</u>	<u>Age</u>	<u>City & State Residing</u>

PERSONAL REPRESENTATIVE:

Spouse as first choice for Personal Representative

Name and City, State

This is the person who will administer your estate upon your death. List two alternatives to serve.

1. _____
2. _____
3. _____

TRUSTEE:

Name and City, State

This is the person who will manage money for minors or in a marital trust. List two alternatives to serve.

1. _____
2. _____
3. _____

GUARDIAN:

Name and City, State

This is the person who will care for your minor children. List two alternatives to serve.

1. _____
2. _____
3. _____