

WILL INFORMATION FORM
(PLEASE TYPE OR PRINT)

(Fill in the blanks, x out all that do not apply, or where applicable place an "x" beside all that apply.)

DATE: / /

1. YOUR FULL NAME: _____

2. YOUR USUAL SIGNATURE NAME (IF DIFFERENT THAN ABOVE) _____

HOME ADDRESS: _____

BUSINESS ADDRESS: _____

PLEASE DESIGNATE WHERE YOU WANT US TO SEND COPIES OF THE DOCUMENTS WITH AN ASTERISK (*)

HOME PHONE: _____ WORK PHONE: _____ FAX NUMBER: _____ CELL: _____

E-MAIL: _____ SOCIAL SECURITY NO. _____

SPOUSE'S FULL NAME: _____

YOUR LIVING CHILDREN (NATURAL OR ADOPTED) ARE:

<u>FULL NAME</u>	<u>ADDRESS</u>	<u>AGE</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

IF YOU HAVE CHILDREN WHO ARE DECEASED, PLEASE LIST BELOW:

1. _____

2. _____

IF YOU HAVE GRANDCHILDREN (CHILDREN OF YOUR DECEASED CHILDREN ONLY), PLEASE LIST BELOW:

1. _____ 4. _____

2. _____ 5. _____

3. _____ 6. _____

DO ANY OF YOUR CHILDREN OR GRANDCHILDREN REQUIRE SPECIAL CONSIDERATIONS? (CONSIDER, FOR EXAMPLE, THEIR EDUCATIONAL, MENTAL, OR PHYSICAL NEEDS.) DESCRIBE:

ARE THERE ANY PERSONS OTHER THAN MINOR CHILDREN WHO ARE DEPENDENT UPON YOU? IF SO, WHO AND HOW? _____

WHOM DO YOU SELECT AS PERSONAL REPRESENTATIVE (HEREAFTER "PR") OF YOUR ESTATE? (Please list at least 2 persons if possible):

A. IF YOU ARE MARRIED, DO YOU WISH YOUR SPOUSE TO BE THE PR? Yes/No List in order of preference:

1. NAME: _____ RELATIONSHIP: _____
 First Middle Last

ADDRESS: _____
 Street City State Zip

2. NAME: _____ RELATIONSHIP: _____
 First Middle Last

ADDRESS: _____
 Street City State Zip

B. IF YOU HAVE MINOR CHILDREN AND THE CHILDREN'S OTHER PARENT DOES NOT SURVIVE YOU, WHO WOULD YOU LIKE TO APPOINT AS THEIR GUARDIAN?

First Choice:
NAME: _____ RELATIONSHIP: _____
 First Middle Last

ADDRESS: _____
 Street City State Zip

Second Choice:
NAME: _____ RELATIONSHIP: _____
 First Middle Last

ADDRESS: _____
 Street City State Zip

C. IF YOU NAMED A COUPLE AS CO-GUARDIANS, DO YOU WANT THE SURVIVOR TO BE THE GUARDIAN OR DO YOU WANT YOUR SECOND CHOICE? Survivor/Second Choice

D. IF YOU NAMED A COUPLE AS CO-GUARDIANS AND THEY GET A DIVORCE, DO YOU WANT ONE OF THEM TO BE THE GUARDIAN OR DO YOU WANT TO PROCEED TO YOUR NEXT CHOICE? Husband/Wife/Next Choice

SOME OF THE FOLLOWING PROVISIONS MAY NOT BE APPROPRIATE IF YOU HAVE A TAXABLE ESTATE AS DEFINED BY THE INTERNAL REVENUE CODE AND YOU WISH TO AVOID TAXES. SEE ATTORNEY FOR DETAILS IF APPLICABLE.

E. IF YOU ARE MARRIED, DO YOU HAVE ANY ITEMS OF PROPERTY THAT YOU WANT TO GO TO ANYONE, SUCH AS YOUR CHURCH, CHILDREN, OR GRANDCHILDREN? IF SO, PLEASE DESCRIBE AND WRITE "YES" IF YOU WANT THE GIFT TO BE MADE EVEN IF YOUR SPOUSE IS STILL ALIVE:

<u>Name of Beneficiary</u>	<u>Property</u>	<u>Even if Spouse is Alive</u> (Yes/No)
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____

F. IF YOU ARE MARRIED, WHAT DO YOU WANT YOUR SPOUSE TO HAVE FROM YOUR SHARE OF THE ESTATE WHEN YOU DIE, IF YOU ARE THE FIRST TO DIE? (Write Yes or No to all that apply)

- (1) All of my estate: _____
- (2) Personal Items & Effects: _____
- (3) Automobile: _____
- (4) Cash, Certificates of Deposit: _____
- (5) Marital Residence: _____
- (6) Other (Please describe): _____

G. DO YOU WANT TO GIVE YOUR SPOUSE A LIFE ESTATE INTEREST IN ANY PROPERTY? IF SO, PLEASE DESCRIBE: _____

H. WOULD YOUR ANSWERS TO "E" THROUGH "G" ABOVE CHANGE IN ANY WAY IF YOUR SPOUSE REMARRIES AFTER YOUR DEATH? YES/NO HOW? _____

I. WOULD YOU LIKE TO HELP YOUR SURVIVING SPOUSE AVOID BEING "TAKEN ADVANTAGE OF" BY SOMEONE WHO MIGHT MARRY THEM FOR THEIR MONEY? YES/NO

J. IF YES, WOULD YOU LIKE TO CREATE A MARITAL TRUST FOR YOUR SPOUSE SO THAT SOMEONE OTHER THAN YOUR SPOUSE IS PRIMARILY IN CHARGE OF WHAT THE SPOUSE GETS FROM YOUR ESTATE AFTER YOUR DEATH? YES/NO

K. IF YOU DO NOT LEAVE A SURVIVING SPOUSE, DO YOU WANT ALL OF YOUR PROPERTY TO BE DIVIDED EQUALLY AMONG YOUR CHILDREN? YES/NO

L. IF THE ANSWER TO "K" IS NO, HOW DO YOU WANT TO LEAVE YOUR PROPERTY?

NAME	RELATIONSHIP TO YOU (Son, Daughter, Etc.)	TO GET HOW MUCH (\$ or %)
1. _____		
2. _____		
3. _____		
4. _____		

M. DO YOU WANT TO HAVE THE RIGHT TO MAKE A LIST OF ITEMS OF PERSONAL PROPERTY THAT YOU MAY WISH TO LEAVE TO INDIVIDUALS SUBSEQUENT TO THE SIGNING OF YOUR WILL EVEN THOUGH YOU KNOW THAT IT MAY NOT BE LEGALLY ENFORCEABLE? YES/NO.

N. IF ONE OF YOUR NAMED BENEFICIARIES DIES BEFORE YOU OR SHORTLY AFTER YOU, WHO DO YOU WANT TO GET THEIR SHARE? THEIR CHILDREN/THEIR SPOUSE/THEIR SIBLINGS/OTHER _____

O. TO WHOM WOULD YOU LEAVE YOUR PROPERTY IF YOU AND YOUR ENTIRE IMMEDIATE FAMILY WERE LOST IN A COMMON DISASTER? EXAMPLES MIGHT INCLUDE YOUR INTESTATE HEIRS, CHURCH, CHARITY, OR MINISTRY. PLEASE DESCRIBE:

IT IS GENERALLY NOT ADVISABLE TO LEAVE PROPERTY DIRECTLY TO MINOR CHILDREN OR TO SOME DISABLED ADULTS. IF YOU ARE LEAVING PROPERTY TO ANYONE IN THESE CATEGORIES, PLEASE FILL OUT THE CHILDREN'S TRUST FORM.

ONE OF THE REQUIREMENTS TO BE COMPETENT TO MAKE A WILL IS THAT YOU KNOW WHAT ASSETS THAT YOU OWN. ALSO, IF WE HAVE A COPY OF YOUR LIST OF ASSETS, WE CAN DIRECT YOUR HEIRS AS TO PROPERTY THEY MAY NEED TO LOOK FOR. THEREFORE, ALTHOUGH IT IS NOT REQUIRED, IT IS SUGGESTED THAT YOU FILL OUT THE ASSET FORM THAT IS ATTACHED. IT IS ALSO IMPORTANT THAT YOU MAKE A DETERMINATION AS TO HOW YOUR ASSETS ARE TITLED SINCE IT IS POSSIBLE THAT JOINTLY OWNED PROPERTY, INCLUDING BANK ACCOUNTS, MAY GO TO THE SURVIVOR OF THE PERSON WHOSE NAME IS ALSO ON THAT PROPERTY RATHER THAN THROUGH YOUR ESTATE.

PLEASE RANK THE FOLLOWING POSSIBLE OBJECTIVES IN THE ORDER OF PRIORITY TO YOU, WITH "1" BEING MOST IMPORTANT AND "10" THE LEAST. USE ALL NUMBERS, 1 THROUGH 10, SO THAT WE CAN SEE WHAT IS MOST IMPORTANT, EVEN BETWEEN TWO OR THREE IMPORTANT ITEMS. ADD ANY COMMENTS OR QUESTIONS YOU WISH TO PROVIDE.

- _____ I want to maintain control over my person and affairs.
- _____ I want to assure my lifestyle and/or standard of living.
- _____ I want to promote my family and spiritual values, even after I am gone.

- _____ I want to avoid spending my assets on nursing home costs if I have to go there.
- _____ I want to protect my assets from government, creditors, and lawsuits.
- _____ I want to reduce my current income taxes.
- _____ I want a plan to manage the value of the family business.
- _____ I want to pass maximum wealth to family members.
- _____ I want to avoid/minimize federal gift and estate tax.
- _____ I want to minimize administrative expense and delay.

COMMENTS OR QUESTIONS: _____

P. ASSETS

(Important: Make sure that you disclose properly how your property is titled. Attach additional sheets if necessary.)

Description or Location	Value	Ownership Interest (Percentage) Survivorship (Yes or No)
LIQUID ASSETS:		
Checking/Savings Accts. _____	\$ _____	_____
Money Market Accts. _____	_____	_____
Certificates of Deposit _____	_____	_____
Loans Receivable _____	_____	_____
Stocks _____	_____	_____
Bonds _____	_____	_____
Mutual Funds _____	_____	_____
Other _____	_____	_____
REAL ESTATE:		
Primary Residence _____	_____	_____
Secondary Residence _____	_____	_____
Investment Property _____	_____	_____
Other _____	_____	_____
BUSINESS INTERESTS:		
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
PERSONAL PROPERTY:		
Motor Vehicles:		
1. _____	_____	_____
2. _____	_____	_____
Expensive Collectibles _____	_____	_____
Other _____	_____	_____
INSURANCE:		
Group _____		
1 Company Name: _____	_____	_____
2 Company Name: _____	_____	_____
Life Insurance Policies:		
1 Company Name: _____	_____	_____

2 Company Name: _____
3 Company Name: _____
4 Company Name: _____

RETIREMENT FUNDS:

Ira _____
Keogh _____
401(K) _____
Pension _____
Profit Sharing _____
Other _____

A. ASSET TOTALS: \$ _____

B. TOTAL DEBT (All sources): \$ _____

C. NET VALUE (A-B) \$ _____

ALSO, PLEASE PROVIDE THE FOLLOWING:

Accountant or Bookkeeper: _____

Primary Bank or Banker: _____

Broker: _____

Insurance Agent: _____

Financial Planner: _____

Other: _____

CHILDREN'S TRUST (OR FOR GRANDCHILDREN)
Minors & Disabled

TRUST - FOR MY CHILDREN/GRANDCHILDREN, I wish the below named trustee to handle their property under the following instructions:

1. I want to create a separate share or fund for each child: Yes _____ No _____
2. I want the children of a deceased child to get their parent's share: Yes _____ No _____
3. I want the income to be paid at least annually: (choose one)
_____ a. equally to beneficiaries
_____ b. at discretion of Trustee
_____ c. other _____
4. I want the trust assets to be: (choose one)
_____ a. held and accumulated by trustee until the ages of distribution
_____ b. used for education, welfare, and maintenance (at trustee's discretion)
_____ c. paid totally at trustee's discretion
_____ d. other _____
5. I want a beneficiary's share to be:
_____ a. distributed as each beneficiary reaches the ages of _____, _____, and _____ (Example: 30, 35, & 40)
_____ b. distributed to all beneficiaries when the youngest reaches the age of _____
_____ c. other (specify) _____
6. I want the trustee to pay for a beneficiary to: (check all that apply and designate if required or discretionary)
_____ a. Attend college or vocational school - required/discretionary
_____ b. Build a home - required/discretionary
_____ c. Start a business - required/discretionary
_____ d. Marry - required/discretionary
_____ e. Other _____
7. If a child dies before final distribution, what do you want to happen to their share?
_____ a. to the deceased child's children
_____ b. to the surviving brothers and sisters
_____ c. other _____
9. If no beneficiaries exist, to whom or where do you want the trust assets to be distributed?
_____ a. your intestate heirs
_____ b. Church (Name) _____
_____ c. Charity (Name) _____
_____ d. Other (Name) _____

I hereby select as trustee(s) for any trust I might create:

Name	Address	Relation	S/J
1st: _____			
2nd: _____			
3rd: _____			
4th: _____			

*Designate if successive (S) or joint (J). I do not recommend two joint Co-Trustees.

TAX SAVING (CREDIT SHELTER) TRUST

If my spouse survives me, I wish to set up a credit shelter trust for the benefit of my spouse and/or children.

Yes _____ No _____

PLEASE FILL IN ALL BLANKS, PLACE AN "X" BESIDE ALL THAT APPLY, OR CROSS OUT EITHER YES OR NO WHERE APPLICABLE.

If they survive me, I wish my spouse to receive everything except for the amount sheltered by the unified credit (since the amount changes, call if you do not know the amount) to be given to my spouse:

_____ Directly to the spouse: Yes/No

_____ In trust for my spouse. If this option is selected, please fill out the marital deduction trust page.

For estate tax purposes, I hereby request that the maximum amount sheltered by the unified credit be put into a trust under the following terms and conditions:

	Trustee Name	Address	Relation	S/J
1st:	_____	_____	_____	_____
2nd:	_____	_____	_____	_____
3rd:	_____	_____	_____	_____
4th:	_____	_____	_____	_____

*Designate if successive (S) or joint (J). I do not recommend two joint Co-Trustees.

2. The income earned by the trust shall be distributed:

Monthly _____ Yearly _____ Accumulated _____ Trustee's Discretion _____

3. A. My income shall be paid:

- _____ (i) to spouse during her life
- _____ (ii) to children equally
- _____ (iii) discretion of Trustee
- _____ (iv) other _____

B. My assets in the trust may be used during my spouse's life for the:

- _____ (i) Support, welfare, and maintenance of spouse
Is this primary? Yes/No
Trustee shall take my spouse's other assets into consideration? Yes/No
- _____ (ii) Support, education, welfare, and maintenance of children
- _____ (iii) Support, education, welfare, and maintenance of grandchildren

4. At my spouse's death, or if I do not have a spouse

A. Separate all property into shares for each child and one share for the children of a deceased child? Yes/No

B. The trust income shall be distributed:

- _____ a. to a child out of said child's share
- _____ b. equally to all beneficiaries (only if 5A is no)
- _____ c. at discretion of Trustee
- _____ d. other _____

C. The assets in each share shall be distributed to a beneficiary

- _____ a. as they reach the ages of _____, _____, and _____ (Example: 30, 35, & 40)
- _____ b. as they reach the age of _____
- _____ c. when the youngest reaches the age of _____

_____ d. other _____

D. My trustee shall have the discretion to pay for my beneficiaries to:

_____ a. Build or buy a house _____ b. College or vocational school

_____ c. Start a business _____ d. Marry

_____ e. Other (Describe) _____

5. My trust shall end at the latest of:

_____ a. my spouse's death

_____ b. my youngest child reaching the age of _____

6. If a child dies before receiving all of their share of the trust, what do you want to happen to their share?

_____ a. to the deceased child's children (in trust until 21, if applicable)

_____ b. to the deceased child's brothers and sisters

_____ c. other _____

7. If no beneficiaries exist, to whom or where do you want the trust assets to be distributed:

_____ a. your intestate heirs

_____ b. church (Name) _____

_____ c. charity (Name) _____

_____ d. other (Name) _____

ADDITIONAL PROVISIONS:
