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INFORMATION TO BE OBTAINED FROM CLIENT IN PREPARING A WILL

INFORMATION ON TESTATOR (THE PERSON WHO IS MAKING THE WILL):

1. Client's **full** name:

2. Date of birth:

3. Former names, if any, (i.e. maiden name and last name in any previous marriages):

4. Home address (**including county**) and **telephone number**:

5. Previous marriages (if any):
 - A. Name of former spouse(s): _____

B. How previous marriages were terminated: (if by divorce, provide the title of the divorce document, the case number, the court in which the divorce was granted, including county and state, and the date the divorce was granted; if by death, the date of death of the spouse)

CHILDREN:

1. Each child of present marriage:

1. Name: _____

2. Date of birth: _____ Sex: _____

3. Address: _____

4. Other parent's name: _____

1. Name: _____

2. Date of birth: _____ Sex: _____

3. Address: _____

4. Other parent's name: _____

1. Name: _____

2. Date of birth: _____ Sex: _____

3. Address: _____

4. Other parent's name: _____

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Other parent's name: _____

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Other parent's name: _____

B. Each child of a previous marriage:

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Other parent's name: _____

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Other parent's name: _____

1. Name: _____
2. Date of birth: _____ Sex: _____
3. Address: _____
4. Other parent's name: _____

1. Name: _____

2. Date of birth: _____ Sex: _____

3. Address: _____

4. Other parent's name: _____

1. Name: _____

2. Date of birth: _____ Sex: _____

3. Address: _____

4. Other parent's name: _____

C. Each deceased child:

1. Name: _____

2. Names and addresses of his or her heirs or next of kin:

3. Information regarding the date and place of death:

INFORMATION TO APPOINT THE EXECUTOR OF THE WILL (A TRUSTED FRIEND OR RELATIVE WHO WILL SETTLE YOUR AFFAIRS UPON YOUR DEATH):

1. Name, address (**including county and state**), and relationship to yourself: _____

2. Alternate executor's name, address (including county and state), and relationship to yourself: _____

BENEFICIARIES OF THE WILL:

1. List person(s), whom you wish to receive your property upon your death; include their address(es), including county and state, and their relationship to you. Also indicate whether you wish all of your property to go to this person. If you wish to leave specific property to a designated person, please indicate these gifts in the next section:

2. Specific gifts of property to a designated person (list property as specifically as possible and the name, address and relationship of the person to receive this gift.

PRIOR WILL INFORMATION:

- 1. Location and provisions of prior wills and codicils, if any (please bring the original and any copies of any prior wills when you come in to execute your new will as they will need to be destroyed):

FUNERAL AND BURIAL ARRANGEMENTS:

1. Please indicate any specific requests or whether arrangements are to be left to the discretion of a loved one (name and relationship):

TRUSTS/GUARDIANSHIP PROVISIONS:

1. Trust to be included in will (property will be managed by a trustee rather than going directly to the beneficiary):

2. Provision for guardianship of minor children (including the guardian's name, address, and relationship to testator):

ANY OTHER SPECIAL PROVISIONS OR INSTRUCTIONS IN PREPARING YOUR WILL:

1.

THIS INFORMATION SHEET IS THE BASIS FOR PREPARING YOUR WILL AND SHOULD BE RETURNED TO:

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