

SIMPLE WILL INTAKE FORM

1. Personal Information:

NAME:	
ADDRESS:	
PHONE #:	
MARITAL STATUS:	___ Married ___ Single ___ Separated, not yet Divorced
E-MAIL:	

2. Spouse's Information:

NAME:	
ADDRESS:	

Will your entire estate go to your Spouse, if she survives you? _____

If not, or if you are not married, list the names and address of the persons or organization(s) that you want to receive your assets upon your death:

3. Marital Information:

Have you ever divorced? _____

4. List your children:

Are there any children born out of wedlock: _____

Are there any minor children, if so, state the name and address of the individual(s)

you would like to recommend for guardianship: _____

If one of your children or beneficiary (ies) dies before you, do you want his or her share of your estate to go to your other living children? ____ Yes ____ No

Do you want your deceased child's share of your estate to go to his or her issue (children/grandchildren of that deceased child): ____ Yes ____ No

5. Do you want to make any specific bequests? If so, list the items and state the names of the individuals.

6. Do you want to exclude any individuals from your will? ____ Yes ____ No. If yes, state the full name of each person to be disinherited:

*** Do you want to disinherit an individual if he or she contests your will?
____ Yes ____ No

7. Who do you want to be your Executor (the person that would administer your estate)? If your Spouse, check here _____. If some other person, then state the full name and address of the person: _____.

Would you like to name an alternate Executor in case the person that you have named is unable or unwilling to perform the duties? ____ Yes, _____ (name) ____ No

8. Do you have any special requests for your funeral or burial? ____ Yes ____ No

Specific Cemetery: _____

Specific directions for your funeral: _____

Cremation: ____ Yes ____ No