WILL WORKSHEET

I. PERSONAL AND FAMILY INFORMATION
(Give full names including middle initial)

Your Family:

1. Husband's Name: ______________________________
   Social Sec. No. ______________________________
   Birthplace: ______________________________
   Birth Date: ______________________________

2. Wife's Name: ______________________________
   Social Sec. No. ______________________________
   Birthplace: ______________________________
   Birth Date: ______________________________

3. Residence Address: ______________________________
   ____

   Phone No. ______________________________

4. Husband's Employer: ______________________________
   Salary: ______________________________
   Business Address: ______________________________
   Business Phone No. ______________________________

5. Wife's Employer: ______________________________
   Salary: ______________________________
   Business Address: ______________________________
   Business Phone No. ______________________________

6. Where should correspondence be sent?
   Residence_____ Business_____

7. Children

Name	Sex	DOB	Birthplace	Married Yes	Married No	Child of H	Child of W	Child of Both

8. Have either or both of you been previously married?
Yes _____ No _____

Reason for separation: Death _____ Divorce _____
(If Divorce, please provide details of your settlement agreement, if any.)

9. Do you have a prenuptial agreement?
Yes _____ No _____
(If yes, please attach a copy)

II. FINANCIAL AND SPECIAL CONSIDERATIONS

1. If either of you expect an inheritance in the future, please explain.
____
____
____

2. Will any members of your immediate family require special treatment (e.g., someone with physical or mental disabilities)? Yes _____ No _____
If yes, please explain.
____
____
____

3. Will anyone, other than children, be dependent on you in the future?
Yes _____ No _____
If yes, please explain.
____
____
____

4. Have you created any trusts? Yes _____ No _____
If yes, please provide a copy of the trust agreement with a schedule of assets.

5. Are you, your spouse, and / or your children currently a beneficiary of a trust?
Yes _____ No _____
If yes, please explain.
____
____
____

6. Have you and / or your spouse ever lived in Louisiana, Texas, New Mexico, Arizona, California, Washington, Idaho, Wisconsin or Nevada, while you were married? Yes _____ No _____
If yes, please explain.
____
____
____

7. Have you and/ or your spouse made any gifts over $10,000 each in any one year to one individual? Yes _____ No _____
If yes, please continue:

How much? ____
Have Gift Tax Returns ever been filed? Yes _____ No _____
If yes, please provide a copy.

8. Do you or your spouse own any interest in a business whose stock is not publicly traded (e.g. small corporations, partnerships, investment groups, etc.)?
Yes _____ No _____
If yes, please explain.
____
____
____

9. Do you have any death benefits available under a "qualified" retirement plan?
Yes _____ No _____
If yes, please continue:

What type of plan is it? Pension _____ Profit Sharing _____ Other _____
What type of benefit is it? Life Ins. _____ Cash Settlement _____
Approximate Value? ____
Who is the beneficiary? ____

10. Where do you keep valuable documents? ___________________________
Who has access to them? _______________________________________

III. DISTRIBUTION OF YOUR ESTATE

A. DISPOSITION OF ASSETS

Special Gifts

1. Would you like to make any charitable bequests, such as to a specific charity?
   Yes _____ No _____
   If yes, please provide full name, address of organization, and amount of gift:
   Name: ____
   Address: ____
   Amount: __________________________

2. Do you wish to make a specific gift to an individual? Yes _____ No _____

   Gift #1
   Name: ____
   Address: ____
   Amount: _____________________ (stated sum of money or percentage of estate?)
   Relationship to you: ____

   Gift #2
   Name: ____
   Address: ____
   Amount: _____________________ (stated sum of money or percentage of estate?)

Residual Gifts

1. Usually a person leaves the residue of the estate to a spouse outright or in trust depending on the estate tax consequences, if the spouse is living, and if the spouse is not living, to children or descendants outright or in trust. Do you want this type of disposition?
   Yes _____ No _____
   If no, please describe how you would like your estate distributed:
   ____
   ____
   ____

2. At what age or ages would you want your children or descendants to receive your estate property (i.e., 1/3 at age 25, ½ at age 30, and remainder at age 35?
   ____
   ____
   ____

B. TRUST

If any trust is included as part of your estate plan, it will be necessary to name one or more trustees to manage the trust. If you already know which individual(s) or company you would like to name as trustee(s), please provide that information below. If you select an individual who is also a beneficiary, there should be two trustees selected to act together. If you leave the following lines blank, we will discuss the options together.

First Choice

A. Trustee's name ____
Relationship to you ____

B. Co-Trustee's name ____
Relationship to you ____

Alternative Choice

Trustee's name ____
Relationship to you ____

Contingent Beneficiaries

Who would you want to receive your estate in the event that you, your spouse, and all your children / descendants do not survive? Standard language divides your estates equally to your heirs-at-law. Would you be in favor of this type of disposition?
Yes _____ No _____

If no, please provide description of how you would like your estate distributed:
____
____
____

C. PERSONAL REPRESENTATIVE

1. Usually a person names a spouse as personal representative (executor) of the estate and an alternative if the spouse cannot serve for any reason. Do you favor this procedure? Yes _____ No _____

2. Name and address of your selection for personal representative.

First Choice: Write, "spouse" if you want your spouse to serve as your personal representative.
Name: ____
Relationship to you: ____

Second Choice (Alternate):
Name: ____
Relationship to you: ____

IV. SUMMARY OF ASSETS

	Husband	**Wife**	**Joint**
A. Real Estate – Residence	$__________	$__________	$__________
B. Real Estate – Other (please indicate if in another state)	__________	__________	__________
C. Cash, etc.	__________	__________	__________
D. Government Bonds	__________	__________	__________
E. Other Bonds and Notes	__________	__________	__________
F. Stocks	__________	__________	__________
G. Business Interests	__________	__________	__________
H. Pension or Profit Sharing Benefits	__________	__________	__________
I. Personal Property	__________	__________	__________
J. Life Insurance (Face Value*****)	__________	__________	__________
K. Other Assets	__________	__________	__________
L. Mortgage	__________	__________	__________
M. Other Debts and Liabilities	__________	__________	__________
TOTAL	__________	__________	__________

***** On Husband's Life	Policy 1	Policy 2
Owner	____________________	____________________
Beneficiary	____________________	____________________
Cash Value	____________________	____________________
Whole or Term?	____________________	____________________
If term, length in years?	____________________	____________________

On Wife's Life	Policy 1	Policy 2
Owner	____________________	____________________
Beneficiary	____________________	____________________
Cash Value	____________________	____________________
Whole or Term?	____________________	____________________
If term, length in years?	____________________	____________________