

**LAST WILL AND TESTAMENT  
INFORMATION SHEET**

TESTATOR: \_\_\_\_\_ (include middle name)

CITY, STATE OF RESIDENCE: \_\_\_\_\_

**List the First Name, Middle Initial, Last Name, and City, State of the following:**

EXECUTOR: \_\_\_\_\_  
City, State

CONTINGENT EXECUTOR: \_\_\_\_\_  
City, State

PRIMARY BENEFICIARY: \_\_\_\_\_  
City, State

SECONDARY BENEFICIARIES \_\_\_\_\_  
City, State

\_\_\_\_\_  
City, State

\_\_\_\_\_  
City, State

GAURDIAN FOR MINOR CHILDREN \_\_\_\_\_  
City, State

CONTINGENT GUARDIAN \_\_\_\_\_  
City, State

TRUSTEE FOR MINOR CHILDREN \_\_\_\_\_  
City, State

CONTINGENT TRUSTEE: \_\_\_\_\_  
City, State

**AGES CHILDREN TO RECEIVE DISTRIBUTIONS**

AGE	PERCENT
_____	33% of balance
_____	50% of remaining balance
_____	balance of trust principal

SPECIAL REQUESTS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**OTHER ESTATE PLANNING DOCUMENTS**

Name: \_\_\_\_\_

**Durable Power of Attorney**

First Agent:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Relationship: \_\_\_\_\_

Alternate Agent

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Relationship: \_\_\_\_\_

**Advance Health Care Directive/Living Will**

First Agent

\_\_\_\_ Same as above or

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Relationship: \_\_\_\_\_

Second Agent

\_\_\_\_ Same as above or

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Relationship: \_\_\_\_\_

## INSTRUCTIONS FOR WILL WORKSHEET

Below are some general guidelines in considering who to name in your will:

**TESTATOR:** The testator is the individual writing the will. In other words: you.

**CITY AND STATE OF RESIDENCE:** This is where you live at the time of writing the will.

**EXECUTOR:** The executor is the person who will see to it that the provisions of the will are carried out. Typically this is the surviving spouse; however, it can be anyone that you trust.

**CONTINGENT EXECUTOR:** This person would serve as executor if the person named as executor is unable or unwilling to serve. In other words: your second choice.

**PRIMARY BENEFICIARY:** This person would receive your estate. It is almost always 100% to your spouse, but you can list separate primary beneficiaries and the percentage of the estate for each.

**SECONDARY BENEFICIARY:** This is who would receive the estate if you and your primary beneficiary die in a common accident, or if your primary beneficiary has already died. It is almost always your children to share equally, or if there are not children, some other loved one, church, charity, or a combination.

**GUARDIAN FOR MINOR CHILDREN:** This is the person who would care for your children if you and your spouse die in a common accident or if your spouse has already died, and your children are still minors at the time of your death.

**CONTINGENT GUARDIAN:** This person would serve as guardian if the person named as guardian is unable or unwilling to serve. In other words: your second choice.

**TRUSTEE FOR MINOR CHILDREN:** Minor children cannot legally receive your estate; therefore, if you have minor children, a trustee must be used to oversee the money, keep the accounting records and process necessary government paperwork, such as tax returns, until the children become adults. The trustee can only use the money for the care or benefit of the children until they are of distribution age, then the trustee is responsible for distributing the proceeds. Since this provision assumes that your spouse has already died, this person must be a relative, someone you trust, or a financial professional. Many times it is the same person that you named as the guardian; however, I recommend that you consider a financial professional, or bank to at least serve as co-trustee.

**CONTINGENT TRUSTEE:** This person would serve as trustee if the person named as guardian is unable or unwilling to serve. In other words: your second choice. Many times it is a financial professional or the person named as the Contingent Guardian.

**AGES OF CHILDREN TO RECEIVE DISTRIBUTIONS:** Typically children who receive large inheritances at a young age have a tendency to spend it quickly. Therefore, the trust provision of your will protects them from abusing the inheritance. Distributions for health and **education** are allowed as needed. You need to specify three ages for formal distributions. A suggestion would be 25, 30, and 35.

**SPECIAL REQUESTS:** This section might leave a specific amount of money or a specific item to someone other than the primary beneficiary. I suggest keeping these to a minimum.