

WILL AND POWER OF ATTORNEY INFORMATION SHEET

**TESTATOR OR TESTATRIX
PERSONAL INFORMATION**

DATE: _____

1. Full Legal Name: _____
a. Address: _____
b. Telephone No.: _____
2. Name of Spouse: _____
3. Date of Marriage: _____
4. Children Born of This Marriage: _____ Yes _____ No

<u>Full Legal Name</u>	<u>Date of Birth</u>	<u>Presently Living</u>
_____	_____	_____ Yes _____ No
_____	_____	_____ Yes _____ No
_____	_____	_____ Yes _____ No
_____	_____	_____ Yes _____ No

5. Previously Married: _____ Yes _____ No
- a. Name of Former Spouse: _____
(1) Date marriage dissolved (MM-DD-YY): _____
(2) How Dissolved _____ Divorce _____ Death
(3) Children born of this Marriage _____ Yes _____ No

<u>Full Legal Name</u>	<u>Date of Birth</u>	<u>Presently Living</u>
_____	_____	_____ Yes _____ No
_____	_____	_____ Yes _____ No
_____	_____	_____ Yes _____ No

- b. Name of Former Spouse: _____
(1) Date marriage dissolved (MM-DD-YY): _____
(2) How Dissolved _____ Divorce _____ Death
(3) Children born of this Marriage _____ Yes _____ No

<u>Full Legal Name</u>	<u>Date of Birth</u>	<u>Presently Living</u>
_____	_____	_____ Yes _____ No
_____	_____	_____ Yes _____ No
_____	_____	_____ Yes _____ No

- c. NOTE: For purposes of this Will do you declare your spouse's children to be your children, your issue and your heirs at law? _____ Yes _____ No

APPOINTMENT OF REPRESENTATION

6. Executor or Executrix:
a. Spouse to Serve _____ Yes _____ No
7. 1st Alternate Executor or Executrix (Name and Relationship)

8. 2nd Alternate Executor or Executrix (Name and Relationship)

9. 3rd Alternate Executor or Executrix (Name and Relationship)

MINOR CHILDREN

10. Any Minor Children: _____ Yes _____ No
11. Guardian of Children (Name and Relationship)
a. _____
b. 1st Alternate: _____
c. 2nd Alternate: _____
12. Trustee of Children's Trust (Name and Relationship)
a. _____
b. 1st Alternate: _____
c. 2nd Alternate: _____

PROVISIONS OF WILL

13. Disposition of Estate:
a. Everything to Spouse _____ Yes _____ No
b. If "NO" to above, please state disposition

14. Note: If husband and wife leave everything to each other, what is disposition if both die?
a. To surviving children _____ Yes _____ No
b. Other: _____

- c. Any children specifically excluded _____ Yes _____ No

(1) Names: _____

15. Specific bequests: The following statement will be shown in the Will:

“I bequeath to my executor certain items of personal property to be disposed of in accordance with a letter or instructions to be found with my Last Will and Testament.”

You may still state other specific bequests for stocks, automobiles, real property, etc. if desired.

16. Miscellaneous Information:

POWERS OF ATTORNEY: MUST BE COMPLETED IN CONJUNCTION WITH WILL.

17. Will Spouse be named as first agent? _____ Yes _____ No

18. 1st Alternate

Name: _____
Address: _____
Phone No.: _____

19. 2nd Alternate

Name: _____
Address: _____
Phone No.: _____

20. 3rd Alternate (If Spouse Not Named)

Name: _____
Address: _____
Phone No.: _____