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WILL INTERVIEW SHEET

Will prepared for: Client only ___ Client & Spouse ___ Spouse only ___

Present at interview: H _____ W _____

FULL LEGAL NAME: **(Name as it appears on Drivers license or State ID Card)**

ALIASES OR NICKNAMES:

ADDRESS:

COUNTY:

MARITAL STATUS:

Married ____

Single ____

Widow or Widower ____

Separated ____ If yes, state date of separation_______

Divorced ____ If yes, state date of divorce _________

US Citizen? ____

SPOUSE

FULL LEGAL NAME: **(Name as it appears on Drivers License or State ID Card)**

ALIASES OR NICKNAMES:

ADDRESS: (include County of residence) US Citizen? ____

Was client previously married? ____ if yes, state name of former spouse ___________

Was spouse previously married? ____ if yes, state name of former spouse ___________

Pre-Nuptial Agreement? (Include copy)

CHILDREN

By present marriage: Name Address Birthdate

Client's by previous marriage:

Spouse's by previous marriage:

If single or childless, list next-of-kin:

ASSETS

Including life insurance, what is the estimated value of the estate?

Real Estate: Title FMV Mortgage

Bank Account: Title Value Location

Stocks, Bonds: Title Value Description

Money Market:	Title	Value	Description
Business Interests	Owner	Value	Description
Tangible Personal Property	Estimated Value		
Life Insurance:	Owner	Value	Beneficiary

Who is beneficiary for IRA and all other non-probate property?

Contingent Beneficiary

If minors were named as beneficiaries of life insurance, was a guardian of proceeds appointed?

Annuities	Owner	Value	Beneficiary
			Contingent Beneficiary
Pension	Owner	Value	Beneficiary
			Contingent Beneficiary

Other:

Location of safety deposit box (if applicable):

Outstanding Liabilities	Nature	Amount	Debtor

DISPOSITION OF PROPERTY

SPECIFIC BEQUESTS:

Beneficiary	Relationship	Property Given
Alternate	Relationship	Property Given
Beneficiary	Relationship	Property Given
Alternate	Relationship	Property Given
Beneficiary	Relationship	Property Given
Alternate	Relationship	Property Given

DISPOSITION OF PERSONAL PROPERTY

Beneficiary	Relationship	Property Given
Alternate	Relationship	Property Given

RESIDUARY ESTATE

Beneficiary	Relationship	Share of Residue

Alternate	Relationship	Share of Residue

Taxes: Who Pays Them?

Each Beneficiary on what he/she actually receives? (our default provision)
Or
Residuary of Estate

APPOINTMENT OF FIDUCIARIES

Executor	Relationship	Address

Alternate	Relationship	Address

If trust is needed, specify type of trust:

Common Trust Children

Minority and Disability Trust (age for distribution)

Separate Trusts

If distribution of principal is to be staggered, designate ages.

Trustee	Relationship	Address

Alternate	Relationship	Address

<u>Guardian of Children</u>	Relationship	Address
Alternate	Relationship	Address
<u>Guardian of Property Of Minors</u>	Relationship	Address
Alternate	Relationship	Address

Are there any special problems with any of the beneficiaries designated which should be considered when drafting the Will?

Did you have to inform client and/or spouse of elective share?

Discuss the value of Long Term Care Insurance.

Health Care decision makers:

Home and cell phone numbers of decision makers.

Any Pets that need to be cared for?

<u>Additional Comments</u>

9-30-11