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Asset Protection, Estate Planning, and Will Information
Date: March 2, 2008

I. Testator/Testatrix – Person(s) Making the Will

a. Name _____ Date of Birth _____
Social Security No. _____ U.S. Citizen Yes ___ or No ___
U.S. Armed Services No. _____

Name _____ Date of Birth _____
Social Security No. _____ U.S. Citizen Yes ___ or No ___
U.S. Armed Services No. _____

b. Street Address _____ (County) _____

c. City and State _____ Zip _____

d. Phone: Home _____ Work _____

e. Did you execute a Premarital Agreement? Yes ___ or No ___

f. Prior Marriages _____

g. Date and Place of Divorce _____

h. Did you execute a Separation of Property Agreement? Yes ___ or No ___

II. Children - Please list all children:

	Name	Birth Date	Name of Spouse	Address
1.				
2.				
3.				
4.				
5.				
6.				

a. Have any children received an advance on their inheritance or are any children financially indebted to you?

1.

- 2.
- 3.
- 4.
- 5.
- 6.

b. Is there any reason to treat your children other than equally?

c. Are any of your children spendthrifts?

d. Are any of your children under a disability?

e. Are any of your children predeceased with surviving issue?

f. Are any of your children from a prior marriage?

g. If any of your children should predecease you, do you wish his/ her share to pass through to his /her child(ren)? If so please indicate the name of each grandchild, by parent.

Name	Date of Birth	Parent
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h. Do you wish to establish a trust for the benefit of your children and/or grandchildren? Yes ____ or No ____. If so, who will be trustee?

a. First Choice: Name _____
Address _____

b. Alternate trustee: Name _____
Address _____

c. Terms of distribution (education, marriage, etc.) _____

d. Age(s) for distribution to children from the trust? _____

e. How should your estate be distributed if no child(ren) survive you? (Other family members, charity, etc.?)

f. If you do not have children, to whom do you wish your estate to pass and in what share?

g. Please provide the name, present age current address for any living parent. _____

h. Who should be the Personal Representative(s) (Executor) of your estate?

First Choice: Name _____
Address _____

Alternate: Name _____
Address _____

Second Alternate: Name _____
Address _____

i. Do you wish to include any specific bequest of tangible personal property in your will? _____

j. Do you wish to make any charitable bequests? _____

k. Do you anticipate any inheritance:_____ If so, please give details?

l. Is there any other provision that you would like to make in your will that has not been dealt with on this form? _____

- m. Do you have a last Will and Testament now? Yes__ or No__
- n. Do you wish the Court to have continuing supervision over your Personal Representative during the administration of your estate?
- o. Do you wish that your Personal Representative be required to file, with the Court inventories and accounts on your estate during the period of estate administration?
- p. Do you desire your Personal Representative be bonded (the bond premium to be paid from the assets of your estate) in order to insure that the interests of those persons who will share in your estate are protected or do you wish to waive bond? Bond required ____ Waive bond ____
- q. Do you wish to authorize your Personal Representative to deal your estate assets in matters that would otherwise be prohibited due to conflicts of interest [e.g. sale, lease or encumbrance of estate assets to the Personal Representative or to an entity in which the Personal Representative or to an entity in which the Personal Representative has a substantial beneficial interest?
- r. Do you want to establish a Durable General Power of Attorney for Health Care/Advance Medical Directive, stating your preferences for health and treatment if you should become terminally ill: _____

- s. Do you wish to become an organ and/ or tissue donor? If yes have you signed an organ donor card or indicated on your driver's license you intend to be an organ donor? Have you told your family about your intention to be an organ donor?
- t. Do you have any special requests regarding funeral or burial instructions. If so this is best handled by a letter of instruction

or other statement separate from your Will to your family or other responsible person.

III. ASSETS: Identify, Value, and Address any Special Concerns Regarding Disposition of Assets.

1.

2.

IV.