

2. Testator's Spouse

Spouse's full name:

First	Middle	Last
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Date of marriage: _____

3. Previous Marriages

Is this your first marriage? Yes No

If not, list the names of your former spouse(s), indicate whether the marriage ended in death or divorce, and the date of that death or divorce.

4. Testator's Children and Other Descendants

Please list the names of all your biological or adopted children and their respective dates of birth. [If any of your children are deceased, please indicate]

If you have any stepchildren whom you haven't legally adopted, do you wish to treat them as your children for purposes of your will?

Yes No n/a

Please list the names of all your stepchildren and their respective dates of birth.

Please list the names of all your grandchildren and the names of their respective parents.

5. Distribution of Property

Please indicate, by checking the appropriate option, how you want your assets to pass when you die.

a. _____ Option #1: I want my assets to pass to my spouse and children as follows:

- To spouse, if surviving.
- If my spouse predeceases me, my assets will be divided in equal shares among my children.
- If any of my children predecease me, that child's share shall be distributed to his or her children in equal shares.
- In the event my spouse and all my children and descendants fail to survive me, I want my assets to be distributed as follows:

b. _____ Option #2: I am unmarried with children and want my assets to pass:

- In equal shares to my children.

- If one or more of my children predeceases me, that child's share in my estate is distributed to his or her children in equal shares.
- In the event all my children and descendants fail to survive me, I want my assets to be distributed as follows:

c. _____ Option #3: Neither of the above. I want my assets to pass:

6. Executor

Whom have you selected to be executor of your will? [Many people select their spouse to be executor]

Whom have you selected to be alternate executor? [This person will serve if your first executor is not available]

7. Guardian

Note: A guardian is a person lawfully invested with the power, and charged with the duty, of taking care of the person who is incapable of doing so because of age or other incapacity. If your children under the age of eighteen (18) years, a guardian may become necessary in the event of your death (in the case of a single person) or in the case of the joint death of you and your spouse (in the case of a married person). You should obtain the consent of the person(s) before executing your will.

Do you have any minor children?

Yes

No

If yes, whom have you selected to be their guardian?

Whom have you selected to be their alternate guardian? [This person will serve if your first guardian is not available]

8. Trusts

Would you like your minor children/grandchildren's inheritance to be placed in trust?

Yes

No

If yes, at what age would you like their inheritance to be distributed?

18

21

25

Other _____

Whom have you selected to serve as trustee?

Whom have you selected to serve as alternate trustee? [This person will serve if your first trustee is not available]
