



This worksheet has been created so that your wills and other related documents may be completed in an efficient cost efficient manner. The information you submit will be used by our firm to prepare the following documents for you: Last Will and Testament, Living Will, and Durable Power of Attorney for Health Care. Please complete the worksheet as completely as possible and return it to your attorney via email or fax 1-866-800-0980. We are always happy to answer any questions that you may have throughout this process. Thank you for allowing us to be of service to you.

**HUSBAND AND WIFE WILLS
INFORMATION WORKSHEET**

I. General Information

1. Husband's Full Name: _____
2. Spouse's Full Name: _____
3. Home Address: _____
4. Home Phone Number: _____
5. Husband's Email Address: _____
Wife's Email Address: _____
6. Husband's DOB: _____ Wife's DOB: _____
7. Husband's Employer: _____
 - a. Work Phone No: _____
 - b. Work Address: _____
8. Wife's Employer: _____
 - a. Work Phone No: _____
 - b. Work Address: _____

9. Marital Status:

How long have you been married? _____

If either of you are widowed, did spouse have a will? _____

If divorced, what was the date of the final decree? _____

Please list any special provisions in divorce decree: _____

10. Do either of you have any existing or prior wills: _____

11. Children and/or Stepchildren:

NAME	AGE	STATE	

Grandchildren:

NAME	AGE	STATE	PARENT'S NAMES

Trust for Minor Children: _____

Age(s) of Distribution: _____

Special Provisions: _____

Any Special-needs children? _____ If yes, please explain: _____

12. Other Advisors (e.g. accountants, life insurance agents): _____

II. Financial Information

1. Real Property:

ADDRESS	VALUE	MORTGAGES/LIENS

2. Stocks, bonds, other investments (Total value): _____

3. Savings, checking, money market accounts (value): _____

4. Other assets (value): _____

5. Anticipated inheritance: _____

6. Life Insurance:

COMPANY	INSURED	BENEFICIARY	AMOUNT

III. Personal Representatives

1. Executor/Personal Representative: _____
Successor: _____

2. Trustee: _____
Successor: _____

3. Guardian: _____
Successor: _____

IV. Miscellaneous

- 1. Contingent Beneficiaries: _____
- 2. Special Concerns: _____
- 3. Special Bequest: _____
- 4. Lifetime Gifts: _____

V. Advanced Directives

- 1. Living Wills: Husband Yes No Wife: Yes No

Burial Instructions: _____

- 2. Powers of Attorney: Husband Yes No Wife: Yes No

Attorney-in-Fact: _____

Successor: _____