

Personal Property

This includes personal effects, automobiles, stocks, bonds, notes and trust deeds, household furniture, jewelry, etc. List items of significant value (Guideline: \$500 or more) Group other assets.

Total Personal Property _____

Bank Accounts:

In Husband's Name Only (H)
 In Wife's Name Only (W)
 *Jointly (J)
***Title**

Checking

Bank	Address	Account #	\$ _____	_____
Bank	Address	Account #	\$ _____	_____

Savings

Bank	Address	Account #	\$ _____	_____
Bank	Address	Account #	\$ _____	_____

Certificates of Deposit

Bank	Address	Matures	Rate	\$ _____	_____
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Total Liquid Assets _____

Securities:

List Bonds, Stocks, Mortgages,
Notes or Trust Needs

	Cost/Adjusted Basis	Current Value	*Title Held (H) (W) (J)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total Securities _____

Retirement Benefits:

Please name beneficiary and explain monthly income and death benefits.
(Type of Plan: IRA, KEOGH, Employee Plan, etc.)

Total _____

Insurance Policies:

Your estate would receive your life insurance should your named beneficiary predecease you and no contingent beneficiary has been named.

Company Name	Kind of Policy	Beneficiary	Amt of Insur.
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

Total Insurance _____

Real Estate Owned (R.E.):

Address	Cost/Adjusted Basis	Current Value	*Title
Principal Residence _____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total Real Estate _____

*If property is owned jointly with someone other than spouse, please identify other party.

Other Assets (Business, Etc.):

Item	Cost/Adjusted Basis	Current Value	*Title
_____	_____	_____	_____

Notes or Mortgages Owing Against Your Estate:

_____	\$ _____
_____	\$ _____
_____	\$ _____

Total Indebtedness _____

The approximate net value of (my) (our) estate is _____

(Personal property + liquid assets + retirement + insurance + R.E. + other assets - indebtedness = net estate)

I—Disposition of Estate if Spouse Survives:Do you wish to leave all your estate to your spouse? Yes No

If you checked "No" please state other desire.

Other _____

_____**II—Disposition of Estate if Spouse Not Surviving/Specific Legacies, Etc.:**

Include any specific articles such as automobiles, jewelry, or a fixed sum of money that you wish to leave to specific persons or charitable organizations.

*Person	Relationship to Testator	Address	Property or Article Bequeathed
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Residuary Estate:

After specific bequests and debts against the estate are paid, a residuary estate consisting of whatever is left will remain. This is usually disposed of on a percentage basis as it is impossible to tell exactly what this amount will be. For example, four people or charitable organizations could each be remembered for 25% of the residue.

*Person or Organization	Relationship to Testator	Address	Amount or Percent
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Church or Charitable Organization	Address	Amount or Percent
_____	_____	_____
_____	_____	_____
_____	_____	_____

Should any of the money or property be held in trust (e.g. for a term of years or lifetime)?

***Please use legal names. Designate sex by "M" or "F"**

Durable Power of Attorney Agent or Disability Trustee:

(This is the person who takes care of you and your property when you are disabled.)

Health Care Durable Power of Attorney:

***Naming an Executor:**

An executor or executrix must be named, and an alternate should be named in the event that your first choice is not able to serve. An executor should be someone who knows your affairs. It is up to him or her to see that the terms of your will are carried out according to your wishes. For those who die intestate, the court appoints an administrator or executor, but you can choose whom you wish to take care of this important matter of handling your affairs. If trusts are to be created for the benefit of minor children it is sometimes advantageous, for reasons of continuity of management, to appoint the same person as executor and trustee.

Executor's Name	Relationship to Testator	Alternate Executor	Relationship to Testator
_____	_____	_____	_____
_____	_____	_____	_____

Bond? Yes No

Bond? Yes No

Final Executor or Trustee: If the estate is large or complicated or in the event that none of the executors named above are able to serve, it is often advisable to name a major bank or trust company to serve as executor or trustee:

Bank or Trust Company

City/State

***Naming a Guardian:**

If you have minor children, a guardian should be named in the will. This guardian would usually have charge of the children and the property they would receive from your estate. If you wish, you can name a separate guardian of the estate to manage the assets until the children reach legal age. It is often wise to establish a special trust under your will for your children that sets forth your instructions for the management and distribution of the property which will go to your children. This can help your trustee meet your children's individual needs and protect your children while they are learning financial discipline.

Guardian's Name for Minor Children	Relationship to Testator	Address
_____	_____	_____
_____	_____	_____

Alternate Guardian

Name of Trustee for Estate

**Please use given names (i.e., Mary B. Smith, not Mrs. John Smith).*

To the Attorney:

The foregoing five pages of information are my desire concerning my last will and testament. It is my wish to have my will drawn according to these instructions. If you need further information, please contact me at the address and telephone number shown below.

I (we) hereby authorize you to provide a copy of my (our) Will(s) to charitable organization(s)

Name Street City State Telephone/E-mail

Name Street City State Telephone/E-mail

Special Information:

Please use this space for any additional information you wish to give your attorney. Explain any testamentary trusts or other desires not expressed in the foregoing information such as personal messages to your loved ones, listing of funeral and burial instructions, etc.

Is any beneficiary permanently disabled or receiving government assistance? (If so, a special needs trust can be set up.) _____

Are there instructions for the care of pets or should there be a pet trust? _____

Funeral/burial instructions and/or wishes _____

Other _____

Signed _____

Date _____

Attorney's Name _____

Address _____

Phone _____