

WILL INFORMATION WORKSHEET

PART 1: PERSONAL DATA

Name: _____ DOB: _____
Street Address: _____
City: _____ State: __ Zip: _____ Home #: _____
Work #: _____
E-mail: _____ Cell #: _____

Spouse's Name: _____ DOB: _____
Street Address: _____
City: _____ State: __ Zip: _____ Home #: _____
Work #: _____
E-mail: _____ Cell #: _____

CHILDREN'S INFORMATION:

Name	Living?	Age	Birthdate	Married?	City/State of Residence
_____	Yes/No	_____	_____	Yes/No	_____
_____	Yes/No	_____	_____	Yes/No	_____
_____	Yes/No	_____	_____	Yes/No	_____
_____	Yes/No	_____	_____	Yes/No	_____
_____	Yes/No	_____	_____	Yes/No	_____
_____	Yes/No	_____	_____	Yes/No	_____

Is your present spouse the parent of each child? Yes/No

OTHER DEPENDENTS, IF ANY:

Name: _____ Age: _____ Residence: _____

Do you have Grandchildren Yes/No

Do you presently have a Will? Yes: ___ No: ___ If so, what is the date on the Will? _____
Was it signed in Texas? Yes: ___ No: ___ If not, where? _____

Amended Will or Codicil? Yes: ___ No: ___ Date: _____

Are you a beneficiary, trustee (singly or jointly), or creator of a trust? Yes: ___ No: ___ If so, what is the name and date of the trust? _____

**PART II
YOUR DISPOSITIVE PLAN**

Describe in general terms how you wish to distribute your property under your will: _____

If your spouse is a beneficiary, do you want the property to be distributed outright or in trust for the benefit of your spouse?

_____ Outright
_____ In Trust until: _____

If your children are beneficiaries of your property, do you want the property to be distributed to your children outright or in trust until a certain age?

_____ Outright
_____ In Trust until reach age ____, then outright
_____ In Trust with distributions at various ages and amounts
_____ percent at age _____
_____ percent at age _____
_____ percent at age _____
_____ remaining share at age _____

If your grandchildren are beneficiaries of your property, do you want the property to be distributed to your grandchildren outright or in trust until a certain age?

_____ Outright
_____ In Trust until reach age ____, then outright
_____ In Trust with distributions at various ages and amounts
_____ percent at age _____
_____ percent at age _____
_____ percent at age _____
_____ remaining share at age _____

PART III - YOUR DESIGNEES

EXECUTOR (i.e., the person who will be responsible for probating your will, filing the estate tax return, if necessary, and distributing assets to the beneficiaries)

Name of Executor: _____
1st Alternate Executor: _____
2nd Alternate Executor: _____
3rd Alternate Executor: _____

TRUSTEE (i.e., the person who will be responsible for the long-term management of property for the surviving spouse, children or other beneficiaries)

Name of Trustee: _____
1st Alternate Trustee: _____
2nd Alternate Trustee: _____
3rd Alternate Trustee: _____

GUARDIAN OF MINOR CHILDREN (i.e. the person who will take physical care of your minor children should both parents die)

Name of Guardian: _____
1st Alternate Guardian: _____
2nd Alternate Guardian: _____
3rd Alternate Guardian: _____

POWER OF ATTORNEY (i.e., the person who will be responsible for handling your financial affairs in the event you become incapacitated)

Name of Power of Attorney: _____
Address: _____
Hm Phone No.: _____ Wk Phone No.: _____

Alternate Power of Attorney: _____
Address: _____
Hm Phone No.: _____ Wk Phone No.: _____

HEALTH CARE AGENT (i.e., the person who will make medical decisions for you in the event you are unable to make them for yourself.)

Name of Health Care Surrogate: _____
Address: _____
Hm Phone No.: _____ Wk Phone No.: _____

Alternate Health Care Surrogate: _____
Address: _____
Hm Phone No.: _____ Wk Phone No.: _____

DOCUMENTS CLIENT SHOULD BRING TO INTERVIEW, IF AVAILABLE

- _____ 1. Prior and present Wills, and any codicils
- _____ 2. Trust instruments in which client is grantor, trustee, or beneficiary
- _____ 3. Court orders or agreements under which client is obligated to provide support
- _____ 4. Powers of attorney
- _____ 5. Living will and designation of health care surrogate.
- _____ 6. Deeds or other documents which contain the legal description of any real estate you own.

Sandifer Law Office, P.C.
T. Randall Sandifer
201 A West Main
Allen, TX 75013
972-396-1118
www.sandiferlawoffice.com