

ESTATE PLANNING DOCUMENTS PART 1: WILL WORKSHEET as of 19 Dec 12

CLIENT INFORMATION:

Your Full Name (first, middle, last): \_\_\_\_\_, Rank: \_\_\_\_\_, \*SSN: \_\_\_\_\_
Present Address: \_\_\_\_\_
\_\_\_\_ Male, \_\_\_\_ Female; U.S. citizen? \_\_\_\_ Yes \_\_\_\_ No; State of Legal Residence: \_\_\_\_\_
\*Unit of Service Member: \_\_\_\_\_
Duty Phone: \_\_\_\_\_, Home or Cell Phone: \_\_\_\_\_, \*ETS: \_\_\_\_\_, \*PCS: \_\_\_\_\_
(If You Have a Prior Will or Estate Plan, Check This Block [ ] )

MARITAL STATUS (select the most appropriate):

- A. \_\_\_\_ Married once, and my spouse is alive.
B. \_\_\_\_ Married and spouse is alive, but were married before (a prior spouse died or was divorced)
C. \_\_\_\_ Widow/ widower.
D. \_\_\_\_ Previously married, but now divorced and single.
E. \_\_\_\_ Single, never married.
Spouse's full name: \_\_\_\_\_ SSN: \_\_\_\_\_ Is spouse a U.S. citizen? \_\_\_\_ Yes \_\_\_\_ No

CHILDREN: \_\_\_\_ Yes \_\_\_\_ No; If yes, is any child a minor (under 18 years)? \_\_\_\_ Yes, \_\_\_\_ No;
If no, are you expecting a child? \_\_\_\_ Yes, \_\_\_\_ No
Please list your children's full names, ages, sex, and their relation to you, i.e., whether they are your biological, adopted, or stepchild:

- 1. NAME: \_\_\_\_\_ AGE: \_\_\_\_\_ SEX: \_\_\_\_\_ RELATION: \_\_\_\_\_
2. NAME: \_\_\_\_\_ AGE: \_\_\_\_\_ SEX: \_\_\_\_\_ RELATION: \_\_\_\_\_
3. NAME: \_\_\_\_\_ AGE: \_\_\_\_\_ SEX: \_\_\_\_\_ RELATION: \_\_\_\_\_
4. NAME: \_\_\_\_\_ AGE: \_\_\_\_\_ SEX: \_\_\_\_\_ RELATION: \_\_\_\_\_

Is any biological child from a previous relationship? \_\_\_\_ Yes \_\_\_\_ No. Does any child have special needs? \_\_\_\_ Yes \_\_\_\_ No
If you have adopted children or stepchildren, do you wish to treat them the same as your natural children? \_\_\_\_ Yes \_\_\_\_ No

VALUE OF ESTATE: To determine what type of will is appropriate for you, we need an estimate of the value of your estate.
Include the value of all of the property you own in your name, and if married, the value of your spouse's property.
Approximate value of your estate (not including life insurance): \$ \_\_\_\_\_ Value of life insurance (self): \$ \_\_\_\_\_

DO YOU OWN A FAMILY FARM/FAMILY-OWNED BUSINESS: \_\_\_\_ Yes \_\_\_\_ No

DO YOU OWN ANY REAL ESTATE \_\_\_\_ Yes \_\_\_\_ No (If no, skip to next section); If yes, what is its value? \_\_\_\_\_
If yes, who do you own it with? NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_
In what state is the real property located? \_\_\_\_\_
To whom do you want to give the real estate:
A. \_\_\_\_ All to the spouse, if he/she survives
B. \_\_\_\_ to one or more different beneficiaries.
NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_
NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_
C. \_\_\_\_ all real estate is to pass as part of the residuary estate, rather than being separately devised
D. \_\_\_\_ just the Testator's home to the wife (with other real estate passing as part of the residuary estate)
E. \_\_\_\_ the wife is to have a life estate.

GIVING AWAY YOUR PROPERTY

PERSONAL EFFECTS AND TANGIBLE PERSONAL PROPERTY: How do you wish to give your personal property?
SELECT ONE ONLY
A. \_\_\_\_ All to my spouse (If you wish to give everything to your spouse, OR to disinherit spouse check (D))
B. \_\_\_\_ As per a schedule of specific bequests or a personal property memorandum (with items not listed passing to spouse).
C. \_\_\_\_ As per a schedule of specific bequests or a personal property memorandum (with items not listed passing to residuary estate)
D. \_\_\_\_ As provided with regard to the residuary estate - SELECT THIS IF SINGLE.

RESIDUARY ESTATE: Your residuary estate is whatever property remains after paying debts and expenses of administration, and any specific bequests.
A. \_\_\_\_ All to my spouse if he/she survives me, and if not, then to my children and issue.
B. \_\_\_\_ A marital deduction trust f/b/o the spouse (or if she predeceases, to the child and issue)
C. \_\_\_\_ A minimum bequest to my spouse, (disinheriting them to the fullest extent of the law, with the remainder going to child(ren) or other person(s).
D. \_\_\_\_ Various other types of dispositions listed on top of back (check D if you are single and see selections top of back).

- A.  All to one specific beneficiary. NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_
- B.  To more than one beneficiary. If you have more than one beneficiary, are they:
- Specific people who are to share equally. NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_  
NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_
  - A group of people described as a class (e.g., "my brothers and sisters") who are to share equally.  
Explain: \_\_\_\_\_
  - Some other unequal division between the beneficiaries (e.g., 50% to one beneficiary and 25% each to two others). Explain: \_\_\_\_\_
  - Other. Explain: \_\_\_\_\_

**MINORS:** If **any** of your beneficiaries is a minor, at what age do you want them to receive their gift?  18;  21;  1/2 @ 21 and 1/2 @ 25;  1/3 @ 21, 1/3 @ 25, 1/3 @ 30;  Some other age: \_\_\_\_\_ (please indicate the age) (NOTE: Selecting an age greater than 21 will likely require a trust, which may cause your estate to incur additional expenses for the administration of the trust. These would lower the amount available for your beneficiaries. Please **READ LEAVING PROPERTY TO MINORS** below.)

**SECONDARY/CONTINGENT BENEFICIARIES:** If all of the beneficiaries you designated above (spouse, children) die before you, to whom do you wish to leave your estate?

- 1<sup>st</sup> Contingent-NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_ %  
NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_ %
- 2<sup>nd</sup> Contingent-NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_
- Last Resort- NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_

**GRANDCHILDREN:** If you had grandchildren would you want them to receive your child's share if your child did not survive you?  
 Yes  No

**EXECUTOR:** Your Executor (or "personal representative") ensures your estate is settled upon your death. This ordinarily involves going through "probate", a court-administered procedure for settling an estate as provided in your will or under State law. Whom do you wish to have as your executor (cannot name a minor)? (CHECK ONE and follow instructions)

- A.  My spouse. NO NEED TO LIST SPOUSE'S NAME.
- B.  My spouse and a co-executor. Name co-executor below.
- C.  My spouse and a successor executor. Name successor executor below.
- D.  One executor other than my spouse. Name executor below.
- E.  Two co-executors, neither of whom are my spouse. Name two co-executors below.
- F.  One executor and a successor executor, neither of whom are my spouse. Name one executor and a successor below.

NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_  
NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_

**GUARDIAN:** Do you wish to appoint a legal guardian for a minor child **other** than the child's other natural parent?

- A.  One guardian for any child when I die. NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_
- B.  One guardian and a successor guardian. NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_  
SUCCESSOR NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_
- C.  Two co-guardians. Co #1 NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_  
Co #2 NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_

**CUSTODIAN OF PROPERTY:** Would you like the child's guardian, regardless of who it is, to be the custodian of the child's property?  YES  NO. If no, who: NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_

**LEAVING PROPERTY TO MINORS:** Instead of giving your estate directly to a MINOR beneficiary, you may give it to a Trustee, IN TRUST, for the benefit of the minor until they reach the age you designate. The trustee will manage the trust under court supervision. Although the trustee's primary purpose is to safeguard the inheritance, the money can also be used for any minor's health, education, welfare, or maintenance, at the trustee's discretion. For many people, a trust is unnecessary because, under the Uniform Gifts to Minors Act (UGMA/UTMA) language in your will, gifts to beneficiaries under 18 (or, if you prefer, 21) will be controlled by your executor initially, and guardian after probate, without establishing a trust. The executor and/or guardian can still use the minor's inheritance for the benefit of the minor, and this is ordinarily less complicated and less expensive than a trust. Unless you have children from a prior marriage, disabled children, or a very large estate, you might prefer not to use a trust. One disadvantage, however, to the UGMA is that your estate will be divided in as many equal shares as there are minor beneficiaries designated; each minor will receive the remainder of their share as they turn 18 or 21, at your option. A trust may be more appropriate if you do not want your child to get property until after age 21.

**Do you want a trust?**  Yes  No. (If yes, would this be:  One trust for the benefit of all beneficiaries ("pooled" trust), or  Individual trusts for each of the beneficiaries. NOTE: Individual trusts can be very expensive.)

**IF YES WHO DO YOU WANT AS TRUSTEE?** (Please list name and relationship):

- A.  One trustee. NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_
- B.  Two co-trustees. NAMES: \_\_\_\_\_ RELATION: \_\_\_\_\_  
RELATION: \_\_\_\_\_
- C.  One trustee and a successor. NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_  
NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_
- D.  One trustee and a co-trustee who is to be later appointed by the executor.  
NAME: \_\_\_\_\_ RELATION: \_\_\_\_\_

**OFFICE USE ONLY**

**Date Briefed:** \_\_\_\_\_, **Briefed by:** \_\_\_\_\_, **Location:** \_\_\_\_\_; **Attorney:** \_\_\_\_\_; **Date:** \_\_\_\_\_  
**Mode:** CS (SRPC); CD(Demob); CL(Reg.Appt.); CE (ERDE); CN (NEO); CM (Mob Depl Read Ex); CP (Premob); **Case:** WW (Will), WA (AMD), WS (SGLI); **Services:** SW(Will prep); ST (Will w-trust/guardian); SV (AMD); SC (Counsel)