

Nearby Notary LLC
Last Will and Testament
Intake Agreement

Name: _____ Phone# _____

Address: _____ Last 4 of SS# _____

Marital Status (current) : Married _____ Divorced _____ Widowed _____ Separated _____

Marital History: 1st spouse: _____ Status: M D W S (circle one)

2nd Spouse _____ Status: M D W S (circle one)

3rd Spouse _____ Status: M D W S (circle one)

Children natural and adopted, living and deceased:

_____ Living Deceased (circle one)

_____ Living Deceased (circle one)

_____ Living Deceased (circle one)

_____ Living Deceased (circle one)

_____ Living Deceased (circle one)

_____ Living Deceased (circle one)

Are there any children of deceased children (grandchildren by deceased child) YES NO int. _____

If Yes please list their names:

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Real Estate Owned:

Address: _____ % of ownership _____

Address: _____ % of ownership _____

Address: _____ % of ownership _____

Address: _____ % of ownership _____

Bequests:

Executor/ Executrix: Name _____ Phone #: _____

Address _____

Secondary: Name _____ Phone #: _____

Address _____

All the information provided is true and accurate and complete _____ int.

I understand that the preparation fee is non-refundable _____ int.

Signature of Testator _____ Date _____