

BASIC WILL INTAKE SHEET

People Paralegal
denise@peopleparalegal.com
(541) 761-4214

Information about you and your family

Your Full Name: _____

Telephone No.: _____

E-mail address: _____

Mailing Address: _____

Date of birth: _____

MARITAL STATUS:

() Single () Married () Widowed () Divorced () Separated

Spouse's name: _____

Spouse's date of birth: _____

CHILDREN & OTHER PERSONS TO BE CONSIDERED:

Children of current marriage (including legally adopted children):

1. Name: _____

Birthdate: _____ Sex: _____

Are they married? () Yes () No # of Children: _____ Ages: _____

2. Name: _____

Birthdate: _____ Sex: _____

Are they married? () Yes () No # of Children: _____ Ages: _____

3. Name: _____

Birthdate: _____ Sex: _____

Are they married? () Yes () No # of Children: _____ Ages: _____

4. Name: _____

Birthdate: _____ Sex: _____

Are they married? () Yes () No # of Children: _____ Ages: _____

5. Name: _____

Birthdate: _____ Sex: _____

Are they married? () Yes () No # of Children: _____ Ages: _____

Other People to be considered in your Estate:

Name: _____
Age: _____ Sex: _____ Relationship: _____

Name: _____
Age: _____ Sex: _____ Relationship: _____

Name: _____
Age: _____ Sex: _____ Relationship: _____

Charitable Organizations you have supported or wish to support:

Name: _____
Address: _____

Name: _____
Address: _____

Military Service:

Service Serial Number: _____
Branch of Service: _____
Dates of Service: _____
Veterans Administration Disability Number: _____

CURRENT WILLS & TRUSTS

Do you have an existing will or trust? _____
Date of will or trust: _____

Your Representatives

You must select individuals whom you can totally trust to act as a representative of you and to act on your behalf. Please consider who you can rely on to follow your wishes, competently deal with financial matters, and be independent of individuals who would

attempt to exert improper pressure or influence over your affairs. Couples may choose each other (and often do) as their respective first choice for the following roles.

Personal representative

First Choice:

Name: _____

Address: _____

Phone: _____

Second Choice:

Name: _____

Address: _____

Phone: _____

YOUR PROPERTY AND ITS DISTRIBUTION

(note that anything not specifically mentioned will be put into the residuary and will potentially be liquidated by the administrator of the estate)

A. Real Estate (May be left to individual recipients or sold with the proceeds distributed)

Property Address	Owner(s)	Upon death, 1 st choice of distribution	2 nd choice of distribution if 1 st choice not available

B. Investments/Mutual Funds/Stocks/Bonds/Annuities

Type of Investment	Owner(s)	Investment firm/business	Upon death, 1 st choice of distribution	2 nd choice of distribution if 1 st choice not available
Eg: Mutual fund	Self	Edward Jones	Spouse	Children, equally divided with right of survivorship

C. Intellectual property (Patents, Copyrights, Trademarks)

Intellectual Property	Owner(s)	Description (Patent, Copyright, or Trademark)	Upon death, 1 st choice of distribution	2 nd choice of distribution if 1 st choice not available
Eg: Ashland Painting	Self	Copyright – oil painting that friend did depicting Ashland Market	Spouse	Children, equally divided with right of survivorship

D. Personal Property (jewelry, heirlooms, cars, pictures, genealogy, etc.)

Gift	Owner (s)	First Donee	Second Donee
Eg: 5 carat diamond ring	Self	Julie (daughter)	Ben (grandson)

E. Monetary Gifts

To Whom	Amount

Distribution of the remainder of your property

(what to do with everything that is left):

DISPOSITION OF REMAINDER (aka RESIDUE).

Important: The residue of your estate is anything you own that you have not already specifically given to an individual or institution earlier in this questionnaire. The residue, or the left-over assets of your estate may go to one individual or institution or be split between multiple parties (for example: 50% to grandchild A, 50% to grandchild B). Also, should you not decide to split your residue, you may choose a first choice and a second choice (for example: 100% to grandchild A, if grandchild A predeceases you then to charity A).

Any other specific requests:

Appointment of Guardian for children under 18:

Name: _____

Address: _____

Relationship: _____

Alternate:

Name: _____

Address: _____

Relationship: _____