

**WILL INTAKE**

Date: \_\_\_\_\_

Your Email: \_\_\_\_\_

**Your Name:** \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Address \_\_\_\_\_

State of Birth: \_\_\_\_\_

\_\_\_\_\_

County of Residence \_\_\_\_\_

(home) \_\_\_\_\_ (work/cell) \_\_\_\_\_

SS# \_\_\_\_\_

Town of Residence: \_\_\_\_\_

Your Marital Status: Married / Single / Widowed / Divorced / Separated

- **If divorced or separated at any time, please provide date of divorce – If Separated, provide copy of separation agreement \***

Have you executed a Power of Attorney? (If so, please provide a copy) Yes / No

*If you are NOT doing a NEW Power of Attorney, then I do NOT need a copy of your old one*

Have you executed a Health Care Proxy/Living Will? (If so, please provide a copy) Yes / No

*If you are NOT doing a NEW Living Will/HCP, then I do NOT need a copy of your old one*

Your Children's Names, Dates of Birth, and Addresses (living): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Your existing wills, date signed, and location: **PROVIDE PHOTOCOPIES OF EXISTING WILLS** - *You can provide DATE executed for now,:* \_\_\_\_\_

Who do you appoint to carry out the terms of this Will (Executor)?

\_\_\_\_\_

Relationship to you: \_\_\_\_\_

Should your appointed Executor/trix be unable/unwilling to perform such services, who shall serve as your Alternate Executor/Executrix: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

\*\* Any special requests (ie. Cremation vs. Burial?) \_\_\_\_\_

**Specifically state what assets you will be leaving to which person, including, but not limited to: Real property, Money and/or Accounts, including location of and account numbers, Jewelry, Stocks/bonds, Automobiles, including year, make, and model, Antiques, furnishings, Retirement benefits, Other Personal Belongings (Please use additional sheets of paper if necessary)**

- 1) Name of Person you are leaving assets to: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
\_\_\_\_\_  
D.O.B.: \_\_\_\_\_  
SS#: \_\_\_\_\_  
Relationship of this person to you: \_\_\_\_\_  
Describe Assets you are leaving to this person: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 2) Name of Person you are leaving assets to: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
\_\_\_\_\_  
D.O.B.: \_\_\_\_\_  
SS#: \_\_\_\_\_  
Relationship of this person to you: \_\_\_\_\_  
Describe Assets you are leaving to this person: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 3) Name of Person you are leaving assets to: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
\_\_\_\_\_  
D.O.B.: \_\_\_\_\_  
SS#: \_\_\_\_\_  
Relationship of this person to you: \_\_\_\_\_  
Describe Assets you are leaving to this person: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**\*\* If you have Real Estate/Houses: list each property separately & who it should go to:**

**\*\* Special Bequests / heirlooms / jewelry / etc:**

(Please use additional sheets of paper if necessary)

***Typically if they are an adult, it would go to their spouse or children, unless otherwise specific:***

In the event one of these persons pre-deceases you, whom do you leave their assets to? (Name, D.O.B., SS#, Address, and relation to you): \_\_\_\_\_

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***Residuary Estate is "other than" real estate, all other assets/cash/etc***

**Residuary Estate Address** \_\_\_\_\_

Owned: **Yes / No**

Approximate Value of Property: \$ \_\_\_\_\_

Amount Owed on Mortgage: \$ \_\_\_\_\_

Who Occupies this Residence: \_\_\_\_\_

**OTHER REAL ESTATE:**

**(address)** \_\_\_\_\_  
\_\_\_\_\_

**Life Insurance:**

Name and Address of Agent, if any: \_\_\_\_\_

Name of Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Face Amount: \$ \_\_\_\_\_

Name of Insured: \_\_\_\_\_

Type of Policy: \_\_\_\_\_

Primary Beneficiary: \_\_\_\_\_

Other Beneficiaries: \_\_\_\_\_

**Bank Account(s), Account Number(s), Stock(s) Number(s), All other Financial Information/Accounts/Contact Information/Phone Number(s) and Account Numbers:**

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*If you have minor children, who do you want to get Testamentary Guardianship/care of them?*

- ➔ *If you have minor children, who do you want to be in charge of their money/inheritance (may or may not be the same as the Guardian)*
- ➔ *If they may be minors, but not your children, who do you want to name to hold their money/inheritance in trust for them until they attain the age of 18 (or age you choose)?*

Will there be a need for a Guardian for children under the age of 18, should both parties decease simultaneously? **Yes / No**

If so, please state name/address/telephone number(s) of Guardian:

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Alternate Guardian should Guardian be unwilling/unable:

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Is there anyone that you specifically wish to **disinherit**? **Yes / No**

If so, please provide name/address/and reason(s) you wish to disinherit this person(s): (**And specify whether it is Husband or Wife or both who wish to disinherit this person(s).**)

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Is there anything else that you wish to include in your Last Will and Testament that is not mentioned above? **Yes / No**

**BURIAL / LOCATION PREFERNCE?**

**CREMATION?**

If so, please specify below:

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[illegible]





**LIVING WILL/HEALTH CARE PROXY**

1) Do you wish to have a living Will/Health Care Proxy *(a document, which appoints a person to make any and all health care decisions for you based on your wishes specifically stated, should you become incapacitated, including but not limited to being on artificial life support)*. The document should be given to your treating physician, the health care agent you appoint, and the alternative health care agent you appoint. **Yes / No.**

2) If yes, name of person you are appointing as your health care agent (person who will be making any and all of your health care decisions unless you otherwise so state) \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number(s) \_\_\_\_\_

Date of Birth: \_\_\_\_\_

SS#: \_\_\_\_\_

Relationship of this person to you: \_\_\_\_\_

In the event that your appointed agent is unwilling/unable to act as your health care agent, you will need to appoint an alternate. Name of Alternate: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number(s) \_\_\_\_\_

Date of Birth: \_\_\_\_\_

SS#: \_\_\_\_\_

Relationship of this person to you: \_\_\_\_\_

3) Describe your wishes, should you become incapacitated:\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4) **A Living Will directs that medical personnel/physicians withhold or withdraw treatment that serves only to prolong the process of dying if you are in an incurable or irreversible mental or physical condition with no reasonable expectation of recovery**  
*(i.e. You are in a terminal condition, permanently unconscious, or if you are conscious by you have irreversible brain damage and will never regain the ability to make your own decisions or express your wishes.)*

You will be directing that treatment be limited to measures that keep you comfortable and relieve pain, including pain that might occur by withholding or withdrawing treatment. If you are in such a terminal condition, are permanently unconscious, suffering brain/heart or other physical damage that you will not likely be able to perform bodily functions to enjoy life, or you are losing your mental faculties to the extent that you are unable to recognize your family/friends/surroundings/or understand where you are or what you are doing and your condition is unlikely to reverse, do you want the following?

Cardiac resuscitation? **YES / NO**

Mechanical respiration/respiratory support? **YES / NO**

Tube feedings/artificially administered nutrition? **YES / NO**

Hydration? **YES / NO**

Antibiotics? **YES / NO**

Surgery? **YES / NO**

Maximum Pain Relief? **YES / NO**

5) Organ / Tissue Donation: Do you wish to make an anatomical gift, effective upon your death? **YES / NO**

If so, what Organ(s) do you wish to donate, if any?

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If so, what Tissue(s) do you wish to donate, if any?

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Limitations (if any)

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## **POWER OF ATTORNEY**

- 1) **Who do you want to name as your POA? (If married, I suggest your spouse) You can name a total of TWO main POA if you desire, if so indicate whether you want them to HAVE to both sign everything together or whether they can sign separately & include their Name/Address/Phone #:**

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- 2) **Who do you want to name as your ALTERNATE POA? You can name a total of TWO ALTERNATE POA if you desire, if so indicate whether you want them to HAVE to both sign everything together or whether they can sign separately & include their Name/Address/Phone Name/Address/Phone #?:**

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- 3) **Which powers do you want to grant your Agent? (can grant 'catch all' at bottom)**

- ☐ A) real estate transactions;
- ☐ (B) chattel and goods transactions;
- ☐ (C) bond, share, and commodity transactions;
- ☐ (D) banking transactions;
- ☐ (E) business operating transactions;
- ☐ (F) insurance transactions;
- ☐ (G) estate transactions;
- ☐ (H) claims and litigation;
- ☐ (I) personal and family maintenance: If you grant your agent this authority, it will allow the agent to make gifts that you customarily have made to individuals, including the agent, and charitable organizations. The total amount of all such gifts in any one calendar year cannot exceed five hundred dollars;
- ☐ (J) benefits from governmental programs or civil or military service;
- ☐ (K) health care billing and payment matters; records, reports, and statements;
- ☐ (L) retirement benefit transactions;
- ☐ (M) tax matters;
- ☐ (N) all other matters;
- ☐ (O) full and unqualified authority to my agent(s) to delegate any or all of the foregoing powers to any person or persons whom my agent(s) select;
- ☐ (P) all powers listed: A, B, C, D, E, F, G, H, I, J, K, L, M, N, O above

**Who are you naming as your Power of Attorney?**

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

**\*\*\* if you want to name TWO POA, provide info below \*\*\***

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

**Who are you naming as your Alternate Power of Attorney? (If anyone)**

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

**Do you want to name a 2<sup>nd</sup> Alternate POA?**

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

\*\*\* Do you want this to ONLY be in effect if you are incapacitated? \_\_\_\_\_

