

JOHN J. ROSS

ATTORNEY AT LAW

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RossElderLaw.com

Client Name: _____

Address: _____

Phone: _____

Last Will and Testament

Please list the person or charities that you want your assets to pass to upon your death. (Please specify an amount or percentage for each beneficiary) _____

Please list the person or charities that you want your assets to pass to if your primary beneficiaries die before you. (Please specify an amount or percentage for each beneficiary) _____

Do you wish to make any specific bequests, that is, to leave specific items, such as jewelry, collectibles, furnishings, etc. to specific people? If you want the bequests to be contained in your will, list the specific items and the people to whom you wish to leave them on the lines below.

If, in the alternative, you wish to compile such a list and/or change or add to such a list after the execution of your will, a template that you can utilize will be provided.

Do you wish to give your spouse the option to allocate assets to a trust in order to reduce estate taxes? If yes, who do you want to be the Trustee (the person who will make distributions from the trust and manage the assets in the trust)?

Primary Trustee _____

Secondary Trustee _____

Tertiary Trustee _____

Do you want assets held in trust for any person until he or she attains a certain age? If yes, until what age?_____

If yes, who do you want to be the Trustee?

Primary Trustee_____

Secondary Trustee_____

Tertiary Trustee_____

Do you want assets held in trust for any other reason, such as to protect assets for a disabled child or grandchild? If so, list the person and the reason_____

If yes, who do you want to be the Trustee?

Primary Trustee_____

Secondary Trustee_____

Tertiary Trustee_____

Who do you want to be Executor (the person who will be responsible for carrying out the terms and conditions of your will)?

Primary Executor_____

Secondary Executor_____

Tertiary Executor_____

Do you have any child or children below the age of eighteen (18)?
If yes, who do you want to be the guardian?

Primary Guardian_____

Secondary Guardian_____

Tertiary Guardian_____

Power of Attorney

Who do you want to be your agent, to handle your legal and financial matters (not including health care decisions)?

Primary_____

Secondary_____

Tertiary_____

Do you want the power of attorney to be effective immediately or only if and when you are disabled?

Choose One: Immediately_____

Only Upon
Disability_____

After I am retained to prepare a power of attorney, a draft will be prepared and forwarded. It will contain an extensive list of powers that you can choose to give your agent. You should review the list carefully so you can see how much power you can delegate. If there are any powers that you want to withhold or eliminate, cross them out and the final draft will eliminate them. For example, please note in particular provisions that would your agent the ability to transfer assets for reasons that include but are not limited to preservation of assets against nursing home costs.

If you have any questions, please do not hesitate to call me or one of my paralegals.

Very truly yours,

John J. Ross