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WILLS & TRUST PACKAGE

Presented By

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NOTE
HUSBAND/MALE/SINGLE MALE
WIFE/FEMALE/SINGLE FEMALE
AS APPLICABLE

NOTE: Return this form when completed to tamar@tamarhamiltonlaw.com

Male/Husband's Name: _____

Female/Wife's Name: _____

Homestead Property: _____

Additional Real Property: _____

Joint Children:

Husband's Children (if separate):

Wife's Children (if separate):

Personal Representative for Husband: (Who would you like to handle your estate administration after your passing? They must be either related to you (this includes a spouse) OR a resident of Florida. It cannot be a non-relative who resides outside of Florida)

First Choice: _____

Alternate: _____

Second Alternate: _____

Personal Representative for Wife: (Who would you like to handle your estate administration after your passing? They must be either related to you (this includes a spouse) OR a resident of Florida. It cannot be a non-relative who resides outside of Florida)

First Choice: _____

Alternate: _____

Second Alternate: _____

Attorney-in-Fact for Husband: (Who would you like to handle your financial affairs in the event you are incapacitated, but prior to your passing? This person is not responsible for health care decisions. Financial affairs only. No restrictions on who you can choose.

First Choice: _____

Alternate: _____

Second Alternate: _____

Attorney-in-Fact for Wife: (Who would you like to handle your financial affairs in the event you are incapacitated, but prior to your passing? This person is not responsible for health care decisions. Financial affairs only. No restrictions on who you can choose.

First Choice: _____

Alternate: _____

Second Alternate: _____

Health Care Agent for Husband: **Must include name, address and phone number** (Who would you like to make your medical decisions in the event you are incapacitated and cannot make your own decisions. You should not choose for multiple people to serve together, only one at a time.)

First Choice: _____

Address: _____

Phone Number: _____

Alternate: _____

Address: _____

Phone Number: _____

Second Alternate: _____

Address: _____

Phone Number: _____

Health Care Agent for Wife: **Must include name, address and phone number** (Who would you like to make your medical decisions in the event you are incapacitated and cannot make your own decisions. You should not choose for multiple people to serve together, only one at a time.)

First Choice: _____

Address: _____

Phone Number: _____

Alternate: _____

Address: _____

Phone Number: _____

Second Alternate: _____

Address: _____

Phone Number: _____

Guardian for Minor Children:

First Choice: _____

Alternate: _____

Second Alternate: _____

Disposition of Assets for Husband:

Specific Distributions: (Specific amounts or assets to go to a specific beneficiary “off the top”; i.e. Boat to John Smith; \$25,000 to Jane Doe.)

Residuary Estate: (Distribution of everything else in your estate):

Standard – Everything to spouse. If spouse is predeceased or dies in a common accident, then equally to all children.

Other: (Please provide specific instructions on how you want your assets divided upon your passing. Minimum distribution to spouse is 30% per Florida Statute. You cannot provide for less than 30% to your spouse unless you have an executed Prenuptial or Post-Nuptial Agreement. You always provide for more than 30%):

Specific Distributions: (Specific amounts or assets to go to a specific beneficiary “off the top”)

Assets to be distributed:

Outright (this is distributed directly to the beneficiary. Inherited assets are considered non-marital assets in the event of a divorce but beneficiary has to be extremely careful not to commingle the assets. If the assets are commingled with marital assets, all of the inherited assets become marital assets in the event of a divorce. Assets distributed outright are not creditor protected.)

In trust until age 25 (Assets left in trust can be managed by the beneficiary themselves or by a third party trustee until a certain age chosen by you or indefinitely. Assets left in trust are creditor and divorce protected so long as they remain in trust.)

In trust until age ____

Other: _____

Disposition of Assets for Wife:

Specific Distributions: (Specific amounts or assets to go to a specific beneficiary “off the top”; i.e. Boat to John Smith; \$25,000 to Jane Doe.)

Residuary Estate: (Distribution of everything else in your estate):

Standard – Everything to spouse. If spouse is predeceased or dies in a common accident, then equally to all children.

Other: (Please provide specific instructions on how you want your assets divided upon your passing. Minimum distribution to spouse is 30% per Florida Statute. You cannot provide for less than 30% to your

spouse unless you have an executed Prenuptial or Post-Nuptial Agreement. You always provide for more than 30%):

Specific Distributions: (Specific amounts or assets to go to a specific beneficiary “off the top”)

Assets to be distributed:

Outright (this is distributed directly to the beneficiary. Inherited assets are considered non-marital assets in the event of a divorce but beneficiary has to be extremely careful not to comingle the assets. If the assets are comingled with marital assets, all of the inherited assets become marital assets in the event of a divorce. Assets distributed outright are not creditor protected.)

In trust until age 25 (Assets left in trust can be managed by the beneficiary themselves or by a third party trustee until a certain age chosen by you or indefinitely. Assets left in trust are creditor and divorce protected so long as they remain in trust.)

In trust until age _____

Other: _____
