

WILL WORKSHEET

1. Basic client information.

Full Name:
Date of Birth:
Address:
State of domicile:
Marital status:
Social security number:
Occupation:
Cell phone:
Email address:

(if applicable)List your spouse's information

Full name:
Date of Birth:
Social security number:
Complete address, or write "Same":
State of domicile, or write "Same":
Occupation:
Cell phone:
Email address:

If you have children, please complete the following:

Child #1
Full name:
Date of Birth:
Complete address, or write "Same":

Child #2
Full name:
Date of Birth:
Complete address, or write "Same":

Child #3
Full name:
Date of Birth:
Complete address, or write "Same":

(Use additional sheets if necessary.)

List any grandchildren as follows (use additional sheets if necessary):

Grandchild #1

Full name:

Date of Birth:

Complete address, or write "Same":

Grandchild #2

Full name:

Date of Birth:

Complete address, or write "Same":

Grandchild #3

Full name:

Date of Birth:

Complete address, or write "Same":

2. Do you know of any reason why another person could challenge your mental competence to execute a valid will? If so, please explain.

3. In Maryland, the executor of your will is called the personal representative and must be a Maryland resident. Who do you want to serve as your personal representative (the person with legal responsibility for handling your property and distributing it as your will directs)? (Please include the full name, social security number and complete address. Also describe your relationship with the executor.)

4. Who do you want to serve as your successor alternate personal representative in the event that your original personal representative is unable or unwilling to serve? (Please include the full name, social security number and complete address. Also describe your relationship with the successor executor.)

5. What property do you want to give away by your will? (Please remember that you must own property before you may give it away. This may not be true in certain circumstances if you are married and property ownership is shared jointly with your spouse. Also please remember that, even if you do own property outright, you may not give it away if a legally binding disposition has already been made, i.e., proceeds from a life insurance policy.) Bank accounts held jointly with rights of survivorship pass to the joint account holder upon your death and are not distributed by your will, nor are those funds included in your estate.

The following is provided to assist you in determining your assets:

ASSETS (Please use additional sheets if necessary.)

<u>Description</u>	<u>How Owned</u>	<u>% Owned</u>	<u>Net Value</u>
A. Cash			

B. Savings Accounts

C. Checking Accounts

D. Money Market Accounts

<u>Description</u>	<u>How Owned</u>	<u>% Owned</u>	<u>Net Value</u>
E. Certificates of Deposits			

F. Mutual Funds

G. Stocks and Bonds

H. Automobiles and Other Vehicles

I. Precious Metals, Jewelry and Furs

J. Household Goods

<u>Description</u>	<u>How Owned</u>	<u>% Owned</u>	<u>Net Value</u>
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K. Clothing			
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L. Art Works and Antiques

M. Tools and Equipment

N. Animals

O. Money Owed to You

P. Profit-sharing Plans, Stock Options, etc.

Q. Limited Partnerships

R. Vested Interests in Retirement Plans, IRAs, Annuities, etc.

S. Other personal property

T. Business personal property (patents, copyrights, etc.)

U. Business Ownerships
(you should have a succession plan if you own a business with others)

V. Business Receivables (rents due, promissory notes, etc.)

LIABILITIES (Please use additional sheets if necessary.)

Note that accurate identification of your creditors is important for speedy disposition of your estate upon your death. Until your personal representative is aware of your creditors and pays your debts, there can be no distribution of your estate.

To Whom Debt is Owed

Net Amount of Debt

A. Personal Loans

B. Other Major Personal Debts

C. Taxes (Past and Currently Due)

D. Other debts owed and to whom

6. To whom do you want to give your property? (For gifts of specific personal property and real property (called specific gifts), please designate a beneficiary, and at least one alternate beneficiary for each specific property. Include the full name, social security number, and complete address for each beneficiary. You may also designate that more than one beneficiary inherit personal and real property and note their percentage of interest in said property. Use additional sheets if necessary.)

7. To whom do you want to leave the residue of your estate after all specific gifts from item 6 above are made? (Please designate at least one alternate beneficiary. Include the full name, social security number, and complete address for each beneficiary. For example, you could leave all of your personal and real property to your spouse with the residue, if any, to my children in equal shares.)

8. If you have a minor child, who do you want to designate as the personal guardian of that child? (Please designate at least one alternate personal guardian. Please include the full names, social security numbers and complete addresses for the guardians. Also include your relationship to the guardians and why you chose those persons.)

9. If property is left to your minor child, who do you want to supervise and administer that child's property? (Please choose at least one alternate. Please include the full names, social security numbers, and complete addresses. Also include your relationship to the guardians and why you chose those persons.)

10. Do you want to provide for your funeral and burial expenses? If so, how?

11. Do you want your debts and taxes to be paid out of your estate?

12. Please list two legally competent adults, who are not beneficiaries, or potential beneficiaries (i.e. relatives), who can serve as witnesses to the signing of your will and other documents you would like me to prepare (see below). (Please include the full names and complete addresses.)

Name:
Address:

Name:
Address:

13. Would you prefer to be buried or cremated?

14. Where would you like to be buried or inurned? If you have no preference, the as determined by the personal representative.

15. An Advance Directive, also known as a Living Will, tells your family and the doctors treating you whether you would like to remain on life support if you are unable to make that decision for yourself. Would you like an Advance Directive prepared? YES NO.

16. Would you like a power of attorney prepared giving someone else complete control over your property and finances? If so, who (it can be your spouse)? Would there be any conditions that would have to occur before the POA becomes effective?

17. A Durable Power of Attorney for Health Care is often prepared so that you designate someone to act on your behalf in the event that you become disabled and lack capacity to make decisions with respect to your health care. This differs from an Advance Directive in that you could be incapacitated for an extended period, not be able to make your own health-care decisions, yet not require life support to keep you alive. Would you like a Durable Power of Attorney for Health Care? YES or NO. Who do you designate as your agent (it can be your spouse)?