

YOUR WILL APPOINTMENT ORGANIZER

INSTRUCTIONS: Scan the **bold-face** items on this list. If any item applies to you, **circle** the number. When you are finished, you will have a list of what you must do before your will appointment, or before your will can be completed. As you complete each item, **check it off**. Note: because of the need for independent witnesses, will signing appointments are scheduled during business hours only.

- _____ 1. What is your **full legal name**? List any other names you've used.
- _____ 2. Have you ever been **married**? Name(s) of all spouses, and whether you're presently married, divorced or widowed.
- _____ 3. Do you have any **children, step-children or adopted children**? If so, their names, birth dates, social security numbers and present addresses (bring whatever information you have).
- _____ 4. Approximate **size of your estate**?
- _____ 5. Are there any **special gifts**:
 - _____ a. Of **money** to specifically designated heirs;
 - _____ b. Of **specific items** to your children or others.
 - _____ c. If the heirs named above die before you, do you want these gifts to **lapse** (go back to your estate) or **go to others**.
- _____ 6. To whom and in what proportion do you want to leave the rest of your estate? These are your **primary heirs**.
- _____ 7. If your primary heirs die before you, who are your **secondary heirs**?
- _____ 8. If any of your heirs are **charitable organizations**, bring names & addresses.
- _____ 9. If you have **children under 18**, whom do you want to appoint as **guardian** in the event you are unable to care for them? Second choice?
- _____ 10. If minor children, do you want their guardian to also be the **trustee of the trust** to be set up for their benefit until they turn 18 (or any age you choose)?
- _____ 11. Who is your first choice to be **executor of the will** (the person who carries out your instructions). Second choice? Third choice? Co-executors?
- _____ 12. Are any persons specifically excluded from your will?
- _____ 13. What are your instructions regarding funerals, burial or cremation?
- _____ 14. Often, a will is done **together with other estate planning documents**. Please indicate if you want us to prepare any of them. Separate checklists are being provided for the Living Trust and Advance Health Care Directive.
 - _____ a. **Living Trust**, which avoids probate of your estate, disposes of your assets like a will, ensures privacy and provides for uninterrupted management of your assets.
 - _____ b. **An Advance Health Care Directive**, which gives another the power to make health care decisions for you if you are unable to make them yourself, and which may provide for the circumstance that your condition is terminal or you're in a coma, and that further medical measures would only prolong the life of the body (formerly contained in a living will).