WILL PLANNING GUIDE

Four Easy Steps to a Meaningful and Money-Saving Will
Will Planning Guide

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Congratulations! You are on your way to getting your financial house in order. And that is a great feeling, knowing that you have honored your family, other loved ones, and the charitable organizations you love, while planning for your future.

Before you visit an estate planning attorney, fill in the blanks below as best you can in each of the four sections.

Doing this basic homework ahead of time will be efficient and less costly for you as you prepare to meet with an attorney. It also helps you think things through at your own pace, so you can have confidence and peace about your decisions. If a question does not apply to you, just leave it blank.

Also, you should jot down any questions that come to mind and take them with you to the meeting with your attorney. When you are finished, simply give a copy to your attorney and keep one for your records.

Step 1. Your Family

You

Full Name:

Other names by which you have been known:

Citizenship:

Date of Birth:

Social Security Number:

Status:  □ Single  □ Married  □ Widowed
         □ Separated  □ Divorced  □ Re-married  □ Live with partner, unmarried

Existing will?  □ Yes  □ No

If yes, what is the date of that will?
**Spouse (if applicable)**

Full Name:

Other names by which you have been known:

Citizenship:

Date of Birth:

Social Security Number:

Status:  
- [ ] Previously widowed
- [ ] Previously divorced

Existing will?  
- [ ] Yes
- [ ] No

If yes, what is the date of that will?

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**Children (include predeceased or children by other marriages)**

**Child #1**

Full Name:

Nature of Relationship:

Date of Birth:

City/State:

Special needs?  
- [ ] Yes
- [ ] No

If married, spouse’s name:

Any children born of this child’s marriage?  
- [ ] Yes
- [ ] No

If yes, list names and ages:
<table>
<thead>
<tr>
<th>Child #2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name:</td>
<td></td>
</tr>
<tr>
<td>Nature of Relationship:</td>
<td></td>
</tr>
<tr>
<td>Date of Birth:</td>
<td></td>
</tr>
<tr>
<td>City/State:</td>
<td></td>
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<tr>
<td>Special needs?</td>
<td></td>
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<tr>
<td>Yes</td>
<td>No</td>
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<tr>
<td>If married, spouse’s name:</td>
<td></td>
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<tr>
<td>Any children born of this child’s marriage?</td>
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<tr>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>If yes, list names and ages:</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Child #3</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name:</td>
<td></td>
</tr>
<tr>
<td>Nature of Relationship:</td>
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<tr>
<td>Date of Birth:</td>
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<td>Special needs?</td>
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<tr>
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<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>If yes, list names and ages:</td>
<td></td>
</tr>
</tbody>
</table>
Child #4

Full Name: 

Nature of Relationship: 

Date of Birth: 

City/State: 

Special needs?  □ Yes  □ No

If married, spouse’s name:

Any children born of this child’s marriage?  □ Yes  □ No

If yes, list names and ages:

Child #5

Full Name: 

Nature of Relationship: 

Date of Birth: 

City/State: 

Special needs?  □ Yes  □ No

If married, spouse’s name:

Any children born of this child’s marriage?  □ Yes  □ No

If yes, list names and ages:

More Children

If you have more than five children, you may list their information here or attach a separate sheet of paper.
Step 2. The People You Trust

Guardianship
Who would you want to be the guardian of any minor children if both you and your spouse are deceased?

First Choice:

Contact Information:

Second Choice:

Contact Information:

Trustee
If you and your spouse died leaving minor children, who would you want to manage their property until they are old enough to handle it on their own?

First Choice:

Contact Information:

Second Choice:

Contact Information:

How and when would you like the assets in the Children's Trust distributed?  

Examples:
- All paid out when my youngest is 25 years old
- 1/3 when my youngest is 21, 1/3 at 26, and 1/3 at 30
- 1/2 when my youngest is 25 and 1/2 at 30

Other instructions?
Executor or Personal Representative

Who would you want to supervise the execution of your will and final distribution of your property?

First Choice:

Contact Information:

Second Choice:

Contact Information:

Do you want to compensate your Executor or Personal Representative?  □ Yes  □ No

Power of Attorney

Who do you want to handle your affairs if you’re unavailable or unable to do so?

Financial/Business Matters

First Choice:

Contact Information:

Second Choice:

Contact Information:

Health Care Decisions

First Choice:

Contact Information:

Second Choice:

Contact Information:

Special Instructions
Step 3. Your Money and Belongings

What You Own (Assets)

**Checking**

Institution Name and Address:

Name(s) on account:

$ Value:

If you have more than one checking account, list the institution name and address, name(s) on account, and $ value here:

**Savings**

Institution Name and Address:

Name(s) on account:

$ Value:

If you have more than one savings account, list the institution name and address, name(s) on account, and $ value here:

**Certificates of Deposit**

Institution Name and Address:

Name(s) on account:

$ Value:

If you have more than one Certificate of Deposit, list the institution name and address, name(s) on account, and $ value here:
**Securities**  (stocks, bonds, mortgages, notes or trust deeds)

Type of Account:

Institution Name and Address:

Name(s) on account:

$ Value:

If you have more than one Securities account, list the type of account, institution name and address, name(s) on account, and $ value here:

**Annuities**

Institution Name and Address:

Name(s) on account:

$ Value:

If you have more than one annuity, list the institution name and address, name(s) on account, and $ value here:

**Retirement Accounts**

Type of Account:

Institution Name and Address:

Name(s) on account:

$ Value:

If you have more than one retirement account, list the type of account, institution name and address, name(s) on account, and $ value here:
**Additional Assets** (business property, limited partnerships, notes receivable, etc.)

Description:

Owner:

$ Value:

If you have additional assets, provide the description, owner and $ value here:

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**Life Insurance**

Life Insurance Company:

Beneficiaries:

Face Value:

If you have more than one life insurance policy, list the company, beneficiaries and face value here:

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**Homes and Real Estate**

Home/Real Estate Description:

Address:

Name(s) on Title:

Approximate $ Value:

If you have more than one home or property, list the home/real estate description, address, name(s) on title and approximate $ value here:
**Vehicles** *(automobile, RV, motorcycle, watercraft, etc.)*

Vehicle Description:

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Owner:

$ Value:

If you have more than one vehicle, list the description, owner name, and $ value here:

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**Household Items** *(furnishings, antiques, jewelry, collectibles)*

Description:

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Owner:

$ Value:

List other significant household items here – including description, owner and $ value:

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What You Owe (Liabilities)

Loans, mortgages, credit cards and other debts

<table>
<thead>
<tr>
<th>Description</th>
<th>$ Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

List any additional debts here – provide the description and $ amount:

Step 4. People and Organizations You Care About

Not only does a will protect and provide for your family, it also communicates what matters most to you. For many, a gift from the will (called a “bequest”) is the largest donation they will ever make - impacting people for generations to come. The most common approaches for bequests are:

- **Add “a child” to your family.** Some families treat charitable organizations like one additional child. For example, if a family has three children, they might add a fourth “child” and divide the assets in their will into four equal parts. Each of their children would receive 25%, and the remaining 25% would be divided among their favorite charitable organizations.

- **Percentage of your estate.** Other families commit a percentage of their estate to the organizations they love, dividing the remaining percentage among their heirs.

- **Set a cap.** Others decide on a “cap” for their children’s inheritance, leaving the rest of their assets to advance the causes that are close to their hearts. This approach is used when the parents want to provide a modest gift to bless their children and eliminate concerns of creating dependence or giving too much too soon.
List the people and organizations to whom you wish to make a bequest:

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<tr>
<th>Name of Person or Charitable Organization:</th>
</tr>
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<tr>
<td>City/State:</td>
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<tr>
<td>Percentage or dollar amount of your estate you wish to leave to this person or organization:</td>
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<td>Description of property you wish to leave (land, home, jewelry, collectibles, etc.)</td>
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Congratulations! You did it! Print a copy of this document for your records and a duplicate copy for your estate planning attorney.

You are building a legacy that will make the world a better place for generations to come!