

Legal Will Worksheet

Please take 10 minutes to fill out the information asked on this page. The information you enter will NOT BE SAVED UNTIL YOU SAVE IT TO YOUR COMPUTER. So please fill out all information at one time. This enables your Will to be completed and returned to you quickly and allows you to fully think through the details of what you want in your Will.

All information on this site is kept confidential under attorney-client confidentiality privileges and will not be used for any purpose. You may view privacy policy for details.

Fields with an * next to them are required in order for your Last Will and Testament to be completed.

Personal Information

* 1. Full Legal Name (e.g., Name used on driver's license or other legal documents):

* 2. Email address for legal contact purposes only (Please check this email address within 3 business days for draft copy of your Will for your review.):

Please re-type your email address:

* 3. Current Street Address (primary place of residence):

* 4. County (e.g. San Diego):

* 5. City

* 6. State

* 7. Zip Code

8. Social Security Number (not required for most people, but helpful for identification purposes if your name is common and you live in a large county):

* 9. Marital status

10. Spouse's full name if married:

11. Do you desire "Reciprocal Wills" for married couples? (Call me for

more information.)

12. Full name, gender, and birthday of all natural and legally adopted children. If a child is not listed, and specifically left out of the Will, he/she may have legal grounds to challenge the Will. Use question number 23, below, to mention those to be left out of a Will. (List oldest child first):

Distribution Information (Need further explanation of this section?)

13. Specific Gifts (e.g. "I give my rare coin collection to my brother Bill, but if he should die before I do, to my sister Julie" etc.) You do not need to provide ANY specific gifts. Most people do not. Feel free, however, to make as many specific gifts as you may desire. Be sure to include 1) the specific item you are giving with enough detail for it to be clearly identified without mistake, 2) the name of the person receiving the gift, and 3) the name of the alternate.

14. General Gifts (e.g. "I give \$10,000 to _____") Again, feel free to make as many general gifts as you desire. Be sure to include 1) the item you are giving with enough detail for it to be clearly identified without mistake, 2) the name of the person receiving the gift, and 3) the name of the alternate.

* 15. Residual Estate (e.g. "Whatever I have left after giving to the people mentioned above, I give to my daughter Dolly, and if she should die before me, to my son Sam") Be sure to include the recipient of the residuary estate and the name of the alternate. If giving all property to one person (e.g., "I give my entire estate to my only son."), provide that information here.

Special Provisions for Minor Children. Skip this section (questions 16-20) if you do not have children under the age of 18.

16. Do you desire that your children reach a certain age before any gift is dispersed to them?

If so, what age? Specify if you want different ages for different children.

17. Who do you want to set up as trustee over the money or property until your minor children reach this age? Please include address for identity purposes.

18. Who is your alternate if your trustee is unwilling or unable? Please include address for identity purposes.

19. Who do you want to set up as legal guardian for your minor children to provide physical care and custody until they reach the age of majority? Please include address for contact and identity purposes.

20. Who is your alternate for care and custody of your minor children? Please include address for contact and identity purposes.

Executor

* 21. Who would you like to name as your Executor (Personal Representative)? Please provide name and address. This is someone whom you trust to manage your property until it is disbursed during the probate process. If you have no preference, the probate court will appoint someone of its choosing.

22. Who would you like to name as your Alternate Executor if your first choice is unable or unwilling to serve?

Other

23. Are there any individuals or entities you specifically want excluded from your Will?

24. Are there any other details not asked in the above questions that you desire to be included in your Will? How about burial or funeral-related instructions?

25. MODIFICATION: I already have an existing Legal Will from Thompson Legal Firm and I would like the following modifications made (e.g., I would like to name a new executor: _____):

Please make sure you save the document and give it a client name that the attorney will recognize before sending it.