

COUPLE WILL WORKSHEET

Documents to be created:

- Will
- General P of A Health Care Directive

Signing Date: Not Sure _____; this will be date of documents.
(Date or Month if known)

Signing at Office: Yes No; If no, County for signing: Default _____

Fee Quoted: \$300 \$500 \$750 \$_____

Correspondence Needed: Fee Agreement Send Draft Send Originals

Successor Executor/Personal Rep Options (after spouse):

- Single Executor One Executor with one named successor
- One Executor with a named successor and then a third named successor
- One Executor with two co-Executors as successor s Two co-Executors only
- Two co-Executors with one named successor co-Executor
- Two co-Executors with survivor acting alone and then a named successor
- Three co-Executors List of Executors in column format

Name and Relationship (and Address if needed) of Executors/Personal Reps:

1. _____
2. _____
3. _____

Names and order are the same for the agents under the General Power of Attorney

Guardian Options (after spouse): Same as Executor/Personal Rep?: Yes No;

If not:

- Single Guardian 1 Guardian with one named successor
- 1 Guardian w/2 co-Guardians as successor Two co-Guardians only
- Two co-Guardians with survivor acting alone and then a named successor.
- List of Guardians in column format

Name and Relationship (and Address if needed) of Guardians:

1. _____
2. _____
3. _____

Optional Paragraphs:

- Do not include an adopted person in the definition of "issue" (default is included)?
- Taxes to be pro-rated between beneficiaries (default is paid from residue)?
- Authority to maintain a business?
- Authority to maintain a farm?
- Exclude IRA/Retirement Plan language in Will?

Distribution of Personal Property:

- Children Sons Daughters Son Daughter Residue
- Other: _____

Specific Distributions:

- Gifts of Cash: Number of Gifts: _____ \$ _____

- Class Gift to: Grandchildren _____

- Transfer gift using UTMA provisions

If a beneficiary is not alive, then to Issue (otherwise gift is added to residue).

- Gifts to Charity: _____

- Individual Gifts: _____

- Transfer gift using UTMA provisions

If a beneficiary is not alive, then to Issue (otherwise gift is added to residue).

If UTMA, age for dist: 18 21 25

Custodian: Parent _____

- Gifts of a Percentage of Trust: Number of Gifts: _____ %

- Class Gift to: Grandchildren _____

- Transfer gift using UTMA provisions

If a beneficiary is not alive, then to Issue (otherwise gift is added to residue).

- Gifts to Charity: _____

- Individual Gifts: _____

- Transfer gift using UTMA provisions

If a beneficiary is not alive, then to Issue (otherwise gift is added to residue).

If UTMA, age for dist: 18 21 25

Custodian: Parent _____

Non-Per Stirpes Distribution:

- Distribute shares of residue to named beneficiaries. # of Shares to divide trust: _____

Names: _____

Make distributions to young beneficiaries under UTMA?

If UTMA, age for dist: 18 21 25

Custodian: Parent _____

Distribute in following manner: _____

Per Stirpes Distribution:

Outright to Child or Children Delay to Ages Family Pot

If Delay or Family Pot:

Single distribution Two step distribution Three step distribution

If single distribution, the age for income distribution and for principal distribution is the same: 18 21 23 25 30 _____

Otherwise,

Age for income distribution (or Family Pot division): 18 21 23 25

Age for 1st principal distribution: 18 21 23 25 30 _____

Age for 2nd principal distribution: 25 30 35 40 _____

Age for 3rd principal distribution: 30 35 40 50 _____

Trustee Options: Same as Executor?: Yes No; If no:

Single Trustee 1 Trustee with one named successor

1 Trustee w/2 co-Trustees as successor

Two co-Trustees only Two co-Trustees with one named successor co-Trustee

Two co-Trustees with survivor acting alone and then a named successor.

Three co-Trustees List of Trustees in column format

Name and Relationship (and Address if needed) of Trustees:

1. _____
2. _____
3. _____

Contingent Distribution:

Heirs-at-Law To _____

Specific Disinheritance; Name: _____

Relationship: _____

Exclude issue of above as well

If Testamentary Trust:

Letter to Life Insurance Company

Letter to Pension Plan Administrator

Power of Attorney:

Alternate Agents (after spouse) Joint Agents

One Alternate Agent Two Alternate Agents Three Alternate Agents

Springing Power Run a Business Make gifts (limited to annual exclusion)

1st Alternate: _____

2nd Alternate _____

3rd Alternate _____

Alternate Agents are same for Health Care

Health Care Directive:

Alternate Agents (after spouse) Joint Agents

One Alternate Agent Two Alternate Agents Three Alternate Agents

1st Alternate: _____

2nd Alternate _____

3rd Alternate _____