



826 BrooksideAve., Suite C • Redlands • California • 92373 • (909) 335-0155

## Will Worksheet

**(Only one person can be on a will. If you are doing a Living Trust you must each have your on will)**

Name: \_\_\_\_\_

Address: \_\_\_\_\_ Phone # \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

County: \_\_\_\_\_ DOB: \_\_\_\_\_ SS# \_\_\_\_\_

Are you married?                      YES                      NO

If yes, spouse's name: \_\_\_\_\_

Do you have any living children, either born to you or legally adopted?    YES    NO

If yes please list your children below:

Only list them if you wish to give them part of your estate.

NAME	GENDER	DOB
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Do you have any grandchildren?    YES                      NO

Only list them if you wish to give them a part of your estate.

NAME	GENDER	DOB
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

How do you want to leave your property when you die?

- Leave it all to your spouse
- Leave most of it to your spouse with some exceptions
- Leave it some other way

If you would like to leave most of it to your spouse with some exceptions would you like to leave it to:

- Leave it to your children
- Leave it to one or more alternate beneficiaries you name
- Name no alternate beneficiary for your estate

If you decide to leave it to your children than would you like them to receive it in:

- equal shares
- unequal shares

If in unequal shares, please specify what percentage will go to each child.

Child: \_\_\_\_\_ %

Child: \_\_\_\_\_ %

Child: \_\_\_\_\_ %

Child: \_\_\_\_\_ %

If you choose to leave it some other way, please explain to whom below:

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If your spouse does not survive you, who would you like to leave the property to?

- Leave it all to your children
- Leave it all to one or more alternate beneficiaries you name
- Make an alternate plan
- Name no alternate beneficiary for your property

Would you like to make any specific bequests?      YES      NO

If yes, please list them below, this would include specific items such as jewelry an old car, etc.

NAME	Property they are to receive
_____	_____

Would you like to name an alternate to this property?      YES      NO

Name: \_\_\_\_\_

NAME	Property they are to receive
_____	_____

Would you like to name an alternate to this property?      YES      NO

Name: \_\_\_\_\_

NAME	Property they are to receive
_____	_____

Would you like to name an alternate to this property? YES NO  
Name: \_\_\_\_\_

NAME \_\_\_\_\_ Property they are to receive \_\_\_\_\_

Would you like to name an alternate to this property? YES NO  
Name: \_\_\_\_\_

NAME \_\_\_\_\_ Property they are to receive \_\_\_\_\_

Would you like to name an alternate to this property? YES NO  
Name: \_\_\_\_\_

Who would you like to name as a beneficiary for your residual (the rest) of your estate?  
Name: \_\_\_\_\_

Would you like to name an alternate? YES NO You may name as many as you would like.

Alternate: \_\_\_\_\_

Alternate: \_\_\_\_\_

Alternate: \_\_\_\_\_

Alternate: \_\_\_\_\_

If you have named more than one alternate, would you like them to receive your residuary estate in  equal shares

unequal shares

Please specify what percentage will go to each alternate beneficiary.

Beneficiary: \_\_\_\_\_ %

Beneficiary: \_\_\_\_\_ %

Beneficiary: \_\_\_\_\_ %

Beneficiary: \_\_\_\_\_ %

Do you want to designate specific assets from which your debts and expenses will be paid? YES NO

If yes, please name those assets and debts

Asset: \_\_\_\_\_ Debts: \_\_\_\_\_

Asset: \_\_\_\_\_ Debts: \_\_\_\_\_

Asset: \_\_\_\_\_ Debts: \_\_\_\_\_

Asset: \_\_\_\_\_ Debts: \_\_\_\_\_

Asset: \_\_\_\_\_ Debts: \_\_\_\_\_

How do you want to handle the issue of death taxes?

Pay them from all property

Use specified assets

Don't specify

If you would like to use specified assets please list them below:

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Please list more information for the beneficiaries you have already mentioned.

Beneficiary: \_\_\_\_\_ Telephone : \_\_\_\_\_

Address: \_\_\_\_\_

Beneficiary: \_\_\_\_\_ Telephone : \_\_\_\_\_

Address: \_\_\_\_\_

Beneficiary: \_\_\_\_\_ Telephone : \_\_\_\_\_

Address: \_\_\_\_\_

Beneficiary: \_\_\_\_\_ Telephone : \_\_\_\_\_

Address: \_\_\_\_\_

Beneficiary: \_\_\_\_\_ Telephone : \_\_\_\_\_

Address: \_\_\_\_\_

Beneficiary: \_\_\_\_\_ Telephone : \_\_\_\_\_

Address: \_\_\_\_\_

Beneficiary: \_\_\_\_\_ Telephone : \_\_\_\_\_

Address: \_\_\_\_\_

Beneficiary: \_\_\_\_\_ Telephone : \_\_\_\_\_

Address: \_\_\_\_\_

If there is any additional information you would like to add to your will in which you feel has not already been covered, please mention it below:

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**ACKNOWLEDGMENT AND AUTHORIZATION**

I understand that the Legal Document Assistant (LDA) preparing my documents is NOT an attorney, cannot select forms and DOES NOT give legal advice. I hereby direct the Legal Documents Assistant to type and perform certain services as outlined in our discussion(s). I further declare that the foregoing information which I have provided is, to the best of my knowledge, true and correct.

Dated:\_\_\_\_\_

\_\_\_\_\_  
Signature