

THE LAW OFFICE OF RICK S. COWLE

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Wills Intake Form

Instructions: answer each question that applies to your situation and use a separate sheet if you need more room making sure that you refer to the question number that you are answering on that sheet

1. Name as used in everyday life, such as on driver's license or payroll records. _____

2. Residence address - be sure to include city and County. _____

3. Mailing address different from above. _____

4. Home and work phone, fax number and e-mail address. _____

5. City and date of birth. _____

6. Name as shown on birth certificate. _____

7. Other names used during life. _____

8. Social Security number of self and of spouse. _____

9. Name and address of father. If deceased, indicate city and year of death and whether a probate proceeding was held. _____

10. Maiden name of mother. _____

11. Current name of mother. _____

12. Name and address of mother. If deceased, indicate city and year of death and whether a probate proceeding was held. _____

13. Names of deceased brothers and sisters, include half brothers and sisters. Indicate whether deceased brothers and sisters left living children and provide the children's names and addresses and approximate ages. _____

14. Names and addresses of living siblings, including half brothers and half sisters. Indicate names and approximate ages of their children. _____

15. Name of spouse and date and place of marriage. _____

16. Names and dates of birth of any children of marriage with spouse. _____

17. Names of prior spouses and date of divorce or death of prior spouse. _____

18. Names, ages and addresses of children of prior marriages. _____

19. Names of aunts, uncles, and first cousins if included in testamentary plan as "heirs-at-law" _____

20. If in the military service, indicate date and place of enlistment and discharge, branch of service, highest rank attained, and serial number. _____

21. If any of testator's children are minors, indicate whom the testator wishes to be the guardian of child or children, if there is a need for a guardian. _____

22. If any of testator's children are minors, indicate whom the testator wishes to appoint as guardian of child's property if there is a need for a guardian. _____

23. Designate alternative guardians if originally named guardian is unwilling or unable to serve as guardian _____

24. Designate personal representative (executor) to gather assets, pay bills, and distribute property in accordance with the will. _____

25. Designate first and second choice of alternate personal representative if originally named personal representative is unable or unwilling to serve as a personal representative. _____

26. Does the testator wish to notify personal representative of appointment as personal representative in the will? _____

27. Does the testator wish to send a copy of will in a sealed or open envelope to personal representative to enable personal representative to move rapidly if necessary? _____

28. Does the testator wish to leave the entire estate to one person? If so to whom? Include full name and address of that person unless described above. _____

29. Who is to inherit if the primary beneficiary predeceases the testator? (Or the alternative takers?) _____

30. Whether any specific monetary bequests? If so, how much and to whom? Is the amount indicated to be free and clear of expenses and taxes or should that person pay some portion of taxes and expenses? _____

31. Who is to receive the specific monetary bequests if the previously indicated beneficiaries predecease the testator? _____

32. Whether there are any specific bequests of personal or real property? Who is to receive the personal or real property if indicated beneficiary predeceases the testator? _____

33. Have funeral and burial arrangements been made? If so, provide details? _____

34. Are there any special requests as to funeral and burial arrangements? Ie Modest, expensive, in accordance with religious and/or fraternal or military ceremonies? _____

35. Do you want a no contest clause? (Anyone contesting the will gets nothing.) _____

36. Any anticipated special problems? _____

37. Any special requests in the will? (Remember, simple wills do not contain trust provisions.) _____

38. List all real estate owned along with description of how title was held an original cost and current value. _____

39. List all life insurance policies with numbers and amount of insurance and beneficiary provisions. _____

40. List all pensions and retirement plans along with beneficiary provisions. _____

41. List all stocks and bonds and other securities along with description of how title was held and cost and current value. _____

42. List all savings and checking accounts and how title was held and approximate balances. _____

43. List valuable personal property such as jewelry and collections and location and approximate value. _____

44. Was any of the property of either spouse inherited? If so, provide the details. _____

45. Was either spouse expected to inherit property in the future? Should that property be treated any differently? _____

46. Does either spouse wish asset protection planning to keep the assets from doctors and hospitals and the State in the event of long-term or expensive medical care needs? _____

47. List all medical insurance coverage. _____

48. Does the testator have any special concerns? (I.e. a pet that they are concerned about the care of) _____

Please note that the law office of Rick S. Cowle does not accept any responsibility for tax planning or asset protection however such assistance is available upon request.