

## WORKSHEET FOR YOUR WILL

**Read Me First!** Before you fill out this worksheet, take the time to read the self-help guide. It includes definitions of some legal terms you need to know. Once you understand the general information, then complete this worksheet. Remember, wills are important legal documents.

**About You:** Many people use more than one name, such as a nickname or middle name. On your will it is especially important to use your full official name, such as the name you use to sign your checks or income tax return.

Full Name:

Street Address:

City, State, Zip

Area Code and Telephone  
Numbers

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**Selecting Your Executor and Alternate:** Enter the name of the person you want to appoint as your executor. Make sure you read the section in the guide on choosing your executor. It is most common that the executor is your spouse.

Full Name:

Street Address:

City, State, Zip

Area Code and Telephone  
Numbers

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I have talked with the above person and he/she agrees to serve as my executor.

\_\_\_\_\_ Yes                      \_\_\_\_\_ No

Enter the name of the person you want to appoint as an alternate, in case your first choice is unable to serve. It is highly recommended that you name an alternate.

Full Name:

Street Address:

City, State, Zip

Area Code and Telephone  
Numbers

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I have talked with the above person and he/she agrees to serve as my alternate.

\_\_\_\_\_ Yes                      \_\_\_\_\_ No

You need to decide if you want your executor to post a bond. This is like buying an insurance policy to protect your estate in the event your executor does something with your property against your wishes. Your estate would pay the premium of this bond.

\_\_\_\_\_ I do \_\_\_\_\_ I do not want my executor to post a bond.

**Assets That I Own.** Before you determine to whom you want to leave your property, you need to think about the property that you have to give away. Remember that some property, such as jointly owned property with right of survivorship, will go automatically to a joint owner, even if you have a will.

**Real Estate:**

**How Owned:**

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**Bank Accounts:**

**How Owned:**

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**Vehicles:**

**How Owned:**

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**Stocks/Bonds:**

**How Owned:**

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**Property in Trust:**

**How Owned:**

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**Marital Status: Please check one**

\_\_\_\_\_ **Currently Married** \_\_\_\_\_ (Full name of spouse)

**Separated?** \_\_\_\_\_ **No** \_\_\_\_\_ **Yes**    **Date Separated:**

\_\_\_\_\_ **Spouse deceased**                      \_\_\_\_\_ **Never married**                      \_\_\_\_\_ **Divorced**

**Selecting the Persons to Be Your Beneficiaries: You need to list the names and addresses of the persons you want to name in your will, as well as your relationship to them. This list could include children, grandchildren, siblings, parents and friends. Be sure to note if anyone is under 18 years of age.**

1.            Full Name:

Street Address:

City, State, Zip:

Relationship:

Under 18:

**Yes**

**No**

2.            Full Name:

Street Address:

City, State, Zip:

Relationship:

Under 18:

**Yes**

**No**

3.            Full Name:

Street Address:

City, State, Zip:

Relationship:

Under 18:

**Yes**

**No**

4.            Full Name:

Street Address:

City, State, Zip:

Relationship:

Under 18:

Yes

No

5.

Full Name:

Street Address:

City, State, Zip:

Relationship:

Under 18:

Yes

No

6.

Full Name:

Street Address:

City, State, Zip:

Relationship:

Under 18:

Yes

No

7.

Full Name:

Street Address:

City, State, Zip:

Relationship:

Under 18:

Yes

No

8.

Full Name:

Street Address:

City, State, Zip:

Relationship:

Under 18:

Yes

No

**Selecting A Guardian for Your Beneficiaries Under Age 18:** In the event any of your beneficiaries are under the age of 18, you will need to appoint a guardian. The guardian can be the same person as your executor, or it can be someone else. This person is to act in the interests of the minor beneficiary(ies).

I want my executor to be appointed as guardian. \_\_\_\_\_ Yes \_\_\_\_\_ No  
If you said no, enter the name of the person you want to appoint as the guardian.

Full Name:

Street Address:

City, State, Zip

Area Code and Telephone  
Numbers

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I have talked with the above person and he/she agrees to serve as the guardian.

\_\_\_\_\_ Yes \_\_\_\_\_ No

Enter the name of the person you want to appoint as an alternate guardian, in case your first choice is unable to serve.

Full Name:

Street Address:

City, State, Zip

Area Code and Telephone  
Numbers

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I have talked with the above person and he/she agrees to serve as my alternate trustee.

\_\_\_\_\_ Yes \_\_\_\_\_ No

**Specific Gifts:** I want to make specific gifts. I give:

To:

To:

To:

To:

To:

To:

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**Your Own Thoughts:** Put in your own words your thoughts about how you wish to distribute your property. For example: "I want everything to go to my husband, but if he dies before I do, I want my children to share everything equally."

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**Questions You Need Answered:**

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