

Worksheet for Your Will

READ ME FIRST!

Before you fill out this worksheet take the time to read the self-help guide on wills. It includes definitions of some legal terms you need to know. Once you understand the general information, complete this worksheet. Remember: wills are important legal documents. If you have any questions, ask a Legal Services Network lawyer.

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 phone number(s): _____

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.

Full name: _____
Street Address: _____
City, State, Zip: _____
Area code and phone number(s): _____

I have talked with this person and s/he 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. We highly recommend that you name an alternate.

Full name: _____
Street Address: _____
City, State, Zip: _____
Area code and phone number(s): _____

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

I do ___ I do not ___ want my executor to post 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:
_____	_____
_____	_____
_____	_____
_____	_____
Checking Accounts:	How Owned:
_____	_____
_____	_____

Savings Accounts:	How Owned:
_____	_____
_____	_____
Vehicles:	How Owned:
_____	_____
_____	_____
Property in Trust:	How Owned:
_____	_____
_____	_____

MARITAL STATUS (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. This list could include children, grandchildren, siblings, and friends. Be sure to note if anyone you name is under 18 years old.

FAMILY

UNDER 18

- Full name: _____
1. Street address: _____ Yes No
 City, State, Zip: _____
 Full name: _____
2. Street address: _____ Yes No
 City, State, Zip: _____
 Full name: _____
3. Street address: _____ Yes No
 City, State, Zip: _____
 Full name: _____
4. Street address: _____ Yes No
 City, State, Zip: _____

OTHERS

UNDER 18

- Full name: _____
5. Street address: _____ Yes No
 City, State, Zip: _____
 Full name: _____
6. Street address: _____ Yes No
 City, State, Zip: _____
 Full name: _____
7. Street address: _____ Yes No
 City, State, Zip: _____
 Full name: _____
8. Street address: _____ Yes No
 City, State, Zip: _____

SPECIFIC GIFTS

I want to make specific gifts. I give:

_____	TO:	_____
_____	TO:	_____
_____	TO:	_____
_____	TO:	_____
_____	TO:	_____
_____	TO:	_____
_____	TO:	_____

YOUR OWN THOUGHTS

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

QUESTIONS YOU NEED ANSWERED

I want to ask my Legal Services Network lawyer: