



**PERSONAL REPRESENTATIVE/EXECUTRIX**

Who do you want as your personal representative (or in some states “executor”) to gather the assets of your estate, pay off your creditors, and distribute the remainder to your beneficiaries?

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

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

**ESTATE VALUE**

Is the estimated value of your estate (including the value of life insurance policies) \$1,500,000.00 (per person)?  No.  Yes. An estate over the amount of \$1,500,000.00 is considered a complex estate.

**PROPERTY**

**REAL ESTATE**

Do you own:  Real Estate  Personal Business  Farm  None of the above

If yes, do you want these items:

To pass with the rest of my estate (known as the Residuary Estate—See below)

To be given to specific people (Please list the assets and to whom they will go)

Asset: \_\_\_\_\_ Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ %Share: \_\_\_\_\_

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Asset: \_\_\_\_\_ Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ %Share: \_\_\_\_\_

**PERSONAL PROPERTY**

Asset: \_\_\_\_\_ Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ %Share: \_\_\_\_\_

Asset: \_\_\_\_\_ Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ %Share: \_\_\_\_\_

Asset: \_\_\_\_\_ Beneficiary: \_\_\_\_\_ Relationship: \_\_\_\_\_ %Share: \_\_\_\_\_

**PERSONAL PROPERTY MEMORANDUM**

You may request a Personal Property Memorandum to give specific items of personal property to specific persons rather than listing them in the will. A Personal Property Memorandum is a separate document that can be completed at a later time and it can be updated from time to time, all without the assistance of an attorney. Do you wish to make a Personal Property Memorandum?  Yes  No

**CASH**

Do you want to give away a specific amount of cash to anyone (normally other than the primary beneficiaries) before dividing all your assets? (Military SGLI proceeds do not count—they are paid out separate from the will and beneficiaries are designated through the MPF)  Yes  No

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ \$Amount: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ \$Amount: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ \$Amount: \_\_\_\_\_

### **BENEFICIARIES**

Primary Beneficiaries: To whom do you want to leave your residuary estate (everything left that you own)?

To my Spouse if he/she survives me, and if not, then to my children.

OR:

Other: List name, relationship and percent that person will receive:

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ \$ Amount: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ \$ Amount: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ \$ Amount: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ \$ Amount: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ \$ Amount: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ \$ Amount: \_\_\_\_\_

### **PROPERTY MANAGEMENT FOR MINORS**

If minor became the beneficiary of your estate, your personal representative or guardian will manage the property and give the remainder to that beneficiary at the age of: 18 19 20 21 (Circle one)

If you choose an age that is over 18, can the beneficiary receive personal property at age 18?

Yes  No

### **GUARDIANS**

If your children are minors when you die, and the other natural parent is not alive or cannot act as guardian, you may appoint someone to act as legal guardian of the children. You can appoint co-guardians.

Primary: \_\_\_\_\_ Relationship: \_\_\_\_\_

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

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

# HEALTHCARE CONSIDERATIONS

## Agent Designation

Who do you wish to designate as your agent to make health care decisions for you if you become incapacitated?

### PRIMARY

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

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

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

### ALTERNATE

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

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

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

### LIVING WILL

Do you want a Living Will (permits you to express your wishes regarding resuscitation and life maintaining measures in the event you later become incapable of communicating your desires)?

Yes  No

### ORGAN DONATION

Is your agent authorized to donate your organs for transplants?

Yes  No

If you answered yes, do you wish to limit your donation to transplant only rather than for any medical, educational or scientific purpose?  Yes, limit to transplant only  No, do not place a limit on tissue and organ donation

Do you have a particular wish to die at home rather than in a hospital?

Yes  No

## FUNERAL ARRANGEMENTS

Would you like to include your wishes regarding funeral arrangements in your will?

Yes  No

If yes, please describe:

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