

LAST WILL AND TESTAMENT INFORMATION WORKSHEET

Disclosure of social security number and other personal information is solicited by authority of Title 10, USC, Section 3012. Disclosure is voluntary. Failure to provide certain information may prevent the drafting of a proper will. All information will be used in the preparation of the will document and will not be disclosed outside the Legal Assistance Division.

INSTRUCTIONS: PRINT CAREFULLY! This worksheet is used to create your Last Will and Testament. You must complete it accurately to avoid delay and unnecessary corrections. Ensure that all information is correct and spelled properly. Ages may be approximate and are used to identify minors (persons under age eighteen). Identify step-children as appropriate.

Is the total value of your property, including life insurance worth over \$1,500,000? Yes / No

1. Name: _____ Today's Date: _____
(First) (Middle) (Last)

2. SSN: _____ 3. Married: Yes / No 4. Circle Status: Active Duty Spouse Other

5. Spouses Name: _____
(First) (Middle) (Last)

6. Is this your first marriage? Yes / No 7. Number of children (all): _____

Children's names: _____

8. Are any of your children adopted or step-children? Yes / No 9. Is any child a minor? Yes / No

10. Circle: I (have) (have not) served in the U.S. Armed Forces. 11. State where you now live: _____

12. Do you own a family business or farm? Yes / No 13. State of permanent residence: _____

(The state where you pay taxes, vote, intend to return or is currently listed on your LES as your domicile. **THIS IS YOUR LEGAL DOMICILE, EVERY PERSON HAS ONE! YOUR WILL MUST BE ADMINISTERED IN YOUR DOMICILE.**)

Your personal representative will manage your assets in accordance with your will after your death. Courts require the person to be over the age of eighteen. Local law of the state listed in question 13 may require the person to be a resident of that state.

14. Personal Representative: _____ Relationship: _____
(First) (Middle) (Last) (Age)

15. Alternate Representative: _____ Relationship: _____
(First) (Middle) (Last) (Age)

16. Do you want to provide for future children (though they may not be born yet) in this will? Yes / No

I LEAVE EVERYTHING TO (FIRST PERSON OR GROUP OF PERSONS):

17. 1st Beneficiary(ies): _____ Relationship: _____
(First) (Middle) (Last) (Age)

_____ Relationship: _____
(First) (Middle) (Last) (Age)

IF THEY ARE NOT LIVING, THEN TO (SECOND PERSON OR GROUP OF PERSONS):

18. 2nd Beneficiary(ies): _____ Relationship: _____
(First) (Middle) (Last) (Age)

(First) (Middle) (Last) (Age) Relationship: _____

(First) (Middle) (Last) (Age) Relationship: _____

(First) (Middle) (Last) (Age) Relationship: _____

IF THE ABOVE GROUP DOESN'T SURVIVE ME, THEN TO (THIRD PERSON OR GROUP OF PERSONS):

19. 3rd Beneficiary(ies): _____ Relationship: _____
(First) (Middle) (Last) (Age)

(First) (Middle) (Last) (Age) Relationship: _____

20. Do you specifically intend to disinherit anyone? Yes / No

If Yes, then full name(s) and relationship(s): _____

If any of your beneficiaries are minor children, then your will must include a trust provision. This can be handled by either appointing a trustee and alternate trustee or by appointing a guardian if the minors are your own children. You cannot appoint a guardian over someone else's children. It is recommended that you appoint a guardian other than the child's other natural parent in the event that the child's other parent does not survive you.

16. Trustee: _____ Relationship: _____
(First) (Middle) (Last) (Age)

17. Alternate Trustee: _____ Relationship: _____
(First) (Middle) (Last)

18. Child's Age at which time the trust will terminate and balance distributed to the beneficiary: _____

19. Choose one: _____ Balance of individual's portion of trust to that beneficiary when he or she reaches the age of distribution. (SEPARATE TRUST)
_____ Balance of trust to all beneficiaries when youngest reaches age of distribution. (UNITARY TRUST)

20. Guardian: _____ Relationship: _____
(First) (Middle) (Last) (Age)

21. Alternate Guardian: _____ Relationship: _____
(First) (Middle) (Last) (Age)

22. Local Address: _____

23. Work Phone: _____ 24. Home Phone: _____ 25. Rank: _____

26. Additional Remarks or Specific Requests: _____
