

SIMPLE WILL INFORMATION SHEET – COUPLE

(Please Print – List the names the way you want them to appear in the documents.)

Your Name: _____

Your Address: _____

Your Email Address: _____

Your Phone No.: _____

Your Soc. Sec. No.: _____

Spouse's Name: _____

Spouse's Soc. Sec. No.: _____

The Children:

Name/Age: _____

Name/Age: _____

Name/Age: _____

Name/Age: _____

Name/Age: _____

(Put an *H* (husband's child), *W* (wife's child), or *B* (child of both) after the name and age of each child.)
(If a beneficiary is not a child, include how s/he is related to you.)

Disposition of Estate

1. **Married.** For married couples, a simple will leaves the estate to the survivor at the first death and then to the children in equal shares at the second death. If a child predeceases you, that share will pass to the descendants of that child, and if there are none to the other children.
2. **Trust.** You must include provisions for the share of a minor to be held in Trust. While in Trust, the Trustee can use the funds to support and educate the beneficiary. You should consider letting the Trustee manage funds even longer. Some clients release funds at age 21, 25 or 30. You might also consider releasing the share of a beneficiary in multiple installments if the distribution is "too much" to give in one installment or if you think a descendant might not preserve the funds well. Please advise us how to disburse funds for a young beneficiary:

In _____ installments, _____ years apart, beginning:

At age 25 or college graduation, whichever comes first.

At age _____ (insert your preferred age for first distribution).

As follows: _____

3. Alternate. If none of your intended beneficiaries survive, how would you leave the estate:

Half to the heirs at law (parents, siblings, nieces and nephews, etc...) of each spouse.

To the following charity or charities: _____

As follows: _____

4. Other Disposition Plans. If you have a blended family, do not treat all children equally, do not have children, want to distribute in part to the children at the first death, want an alternate disposition plan for any other reason, the Will may not really be a "simple" Will. Please set forth below how you want the estate distributed. We will advise you before doing any work of any cost differential.

Personal Representatives

Try to provide multiple backups. If you want multiple people serving together, list them on the same line. List in order by your preference.

Executor: 1. (Spouse)
 2. _____
 3. _____
 4. _____

Trustee: 1. (Spouse)
 2. _____
 3. _____
 4. _____

Guardian 1. _____
(for minor 2. _____
children): 3. _____
 4. _____

Durable Power of Attorney (agent for financial and business matters):
 1. (Spouse)
 2. _____
 3. _____
 4. _____

Durable Health Care Power of Attorney (agent for medical and health matters):
 1. (Spouse)
 2. _____
 3. _____

4. _____

The following prices are for Estate Planning Documents as listed using a standard fact pattern, as we have outlined above. If you have requested a more complicated disposition, the Will becomes more complex and *the price may be adjusted accordingly*. We will notify you of any cost difference before proceeding. The first price is for one instrument. The second price is the cost of the same instrument with consistent terms for a spouse.

Standard documents:

<input type="checkbox"/> Last Will and Testament	\$350/280
<input type="checkbox"/> Durable POA – Financial and Health; and Directive to Physicians (Living Will)	\$145/0

Additional documents:

<input type="checkbox"/> Survivorship Agreement/Deed on Home*	\$150
<input type="checkbox"/> Transmutation Agreement**	\$275

*This allows the home to pass to the survivor without probate. I will need a copy of the current deed.

**This transforms separate property into community property. I will need copies of account statements/deeds, etc. on assets you want to convert to Community Property.

<input type="checkbox"/> Declaration of Guardian for you, as an Adult	\$50/\$25
<input type="checkbox"/> Medical Authorization for a Minor Child	\$50
<input type="checkbox"/> Declaration of Guardian for Minor Children (when there is no Will)	\$75

RETURN TO:

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