

**SIMPLE WILL INFORMATION SHEET – ONE PERSON
(Single; One Spouse Only; Remarried with Prior Children)**

(This form is for use when only one person is making a Will and it benefits the children.)

(Please Print – List 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 (if married): _____

Spouse's Soc. Sec. No.: _____

The Children:

Name/Age: _____

Name/Age: _____

Name/Age: _____

Name/Age: _____

Name/Age: _____

Name/Age: _____

(Note how a beneficiary is related to you, if he or she is not a child.)

Disposition of Estate

1. **Married.** This form is to be used if you want your estate to pass to your children (or other beneficiaries). If a child predeceases you, that share will pass to the descendants of that child, and if there are none, to the other children. If certain assets should go to a spouse outright, or be retained by him/her for life, identify them here (your children will receive the rest, after debts are settled): _____

2. **Single.** For someone who is single (including a surviving spouse) a simple will leaves the estate to the children in equal shares. The share of a predeceased child will pass to the descendants of that child, and if there are none then to the other children.

3. **Trust.** You must include provisions for the share of a minor to be held in a simple Trust. Even if children are grown, there is always the possibility that an adult child may predecease

you, leaving part of the estate to pass to minors. 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: _____

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

- To my heirs at law (parents, siblings, nieces and nephews, etc...)
- To the following charity or charities: _____
- As follows: _____

5. Other Disposition Plans. If your intended disposition is more complicated, this form may not work for you (your Will may not really be a “simple” Will.) Please send us a memo outlining 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. _____
 2. _____
 3. _____
 4. _____

Trustee: 1. _____
 2. _____
 3. _____
 4. _____

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

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

4. _____

Durable Health Care Power of Attorney (agent for medical and health matters):

1. _____
2. _____
3. _____
4. _____

The following prices are for Estate Planning Documents using standard fact patterns, 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.

Standard documents:

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

Additional documents:

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

RETURN TO:

Karen C. Cathey, PC

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McKinney, Texas 75070

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