

SIMPLE WILL INFORMATION SHEET - COUPLE (Blended Family)

(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: _____

Spouse's Soc. Sec. No.: _____

The Children:

Name/Age: _____

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

Disposition of Estate

1. **Married.** If I am married and I die first, I will leave to:
 - a. My children – all of my separate estate (what I owned before I married and what I have inherited), plus any additions, appreciation, income added back into those items.
 - b. My SPOUSE – our home and any assets we have purchased or accumulated together while married. *(If you want this gift made in trust, to assure that “your half” comes back to your children after the second death, then the Will will be more complicated, and we may need an initial conference.)*

If I have no children, then I leave all of my property to my spouse.

2. **Surviving Spouse.** If I am the surviving spouse, I will leave all of my estate to *my* children. If a child predeceases me, that share shall go to his or her children.

3. Trust. If anyone is young or incapacitated, that share can be held in trust for him or her, and managed by someone else (a “trustee”). If a trust is need for a child or grandchild, let the Trustee manage that share and use it for the beneficiary, but eventually distribute the remainder of a Beneficiary’s share in _____ installments, _____ years apart, beginning (*check one and complete it if necessary*):

- 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 my descendants survive me, leave my 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 - Husband

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. _____

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. _____

Personal Representatives - Wife

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. _____

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.

Estate Planning Documents (for *each* spouse):

Standard documents (Includes office visit to execute documents):

- | | |
|--|-------|
| <input type="checkbox"/> Last Will and Testament | \$425 |
| <input type="checkbox"/> Durable POA – Financial and Health; Directive to Physicians (Living Will); Burial POA | \$270 |

Additional documents:

- | | |
|--|-------|
| <input type="checkbox"/> Survivorship Agreement on Home with Deed* (for couple) | \$250 |
| <input type="checkbox"/> Transmutation Agreement (to convert assets into community property)** | \$325 |

*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 | \$125/\$75 |
| <input type="checkbox"/> Medical Authorization for a Minor Child | \$125 |
| <input type="checkbox"/> Declaration of Guardian for Minor Children (when there is no Will) | \$125 |

RETURN TO:

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