

KIRBY, THOMAS, BRANDENBURG & D'AMICO L.P.A.

**CLIENT WILL WORKSHEET
(MARRIED)**

=====
CONFIDENTIAL
=====

Client

Date

1. Full legal name: _____
2. Spouse's name: _____
3. Complete address: _____
4. Telephone number: (____) _____
5. Do you want to leave your entire estate to your spouse? _____
6. Do you have children? _____
7. Do you want to leave your estate to them in equal shares if your spouse dies before you? _____.
8. Please print your children's names:

9. Do you want any children who might be born to you, or adopted by you in the future, to inherit equally with you now-living children? ____
10. If you have no children now, but expect to have some time in the future, would you like a provision in your will to leave your entire estate to any children you may have or adopt in the future if your spouse dies before you? _____
11. Do you have stepchildren? _____ If so, do you want them to share equally in your estate with your own children? _____ If so, please print your stepchildren's name:

CLIENT WILL WORKSHEET (CONTINUED)
(MARRIED)

12. If one of your children dies before you, do you want that child's children (your Grandchildren) to take the share of your estate that would have gone to your deceased child? _____

13. If all the beneficiaries above predecease you, to whom do you want to leave your property?

Name _____

Relationship _____

Address _____

Name _____

Relationship _____

Address _____

14. Do you want to name your spouse as Executor? _____ If not, whom do you want to name as Executor?

Name: _____

Relationship _____

Address _____

15. Whom do you want to name as Alternate Executor?

Name: _____

Relationship _____

Address _____

16. If you have children by a prior marriage, do you want to name your current spouse as Guardian of your children by your former marriage if their natural parent is unable or unwilling to serve? _____

17. Whom do you want to name as Guardian of your minor children if your spouse dies before you?

Name: _____

Relationship _____

Address _____