

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

**CLIENT WILL WORKSHEET
(SINGLE)**

=====
CONFIDENTIAL
=====

Client

Date

1. Full legal name: _____

2. Complete address: _____

3. Telephone number: (____) _____

4. Do you have children? _____

5. Do you want to leave your estate to them in equal shares? _____

If so, please print your children's name:

6. 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? _____

7. 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? _____

8. If one of your children dies before you, to whom do you want to leave your property?

Name: _____

Relationship _____

Address _____

9. If that person (s) should die before you, to whom do you want to leave your property?

Name _____

Relationship _____

Address _____

Name _____

Relationship _____

Address _____

FOR CLIENTS WITH CHILDREN

10. If you are not married but have children, whom do you want to name as Guardian of your minor children?

Name: _____
Relationship _____
Address _____

11. Whom do you want to name as Alternate Guardian?

Name: _____
Relationship _____
Address _____

FOR CLIENTS WITHOUT CHILDREN

12. If you have no spouse or children, to whom do you want to leave your property?

Name _____ Name _____
Relationship _____ Relationship _____
Address _____ Address _____

13. If that person (s) should die before you, to whom do you want to leave your property?

Name _____ Name _____
Relationship _____ Relationship _____
Address _____ Address _____

14. Whom do you want to name as Executor of your estate?

Name: _____
Relationship _____
Address _____

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

Name: _____
Relationship _____
Address _____