

**SIMPLE WILL INTAKE FORM**

**1. Personal Information:**

<b>NAME:</b>	
<b>ADDRESS:</b>	
<b>PHONE #:</b>	
<b>MARITAL STATUS:</b>	___ Married    ___ Single    ___ Separated, not yet Divorced
<b>E-MAIL:</b>	

**2. Spouse's Information:**

<b>NAME:</b>	
<b>ADDRESS:</b>	

**Will your entire estate go to your Spouse, if she survives you? \_\_\_\_\_**

**If not, or if you are not married, list the names and address of the persons or organization(s) that you want to receive your assets upon your death:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**3. Marital Information:**

**Have you ever divorced? \_\_\_\_\_**

**4. List your children:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Are there any children born out of wedlock: \_\_\_\_\_**

**Are there any minor children, if so, state the name and address of the individual(s)**

**you would like to recommend for guardianship:** \_\_\_\_\_

If one of your children or beneficiary (ies) dies before you, do you want his or here share of your estate to go to your other living children? \_\_\_\_ Yes \_\_\_\_\_ No

Do you want your deceased child's share of your estate to go to his or her issue (children/grandchildren of that deceased child): \_\_\_\_ Yes \_\_\_\_\_ No

**5. Do you want to make any specific bequests?** If so, list the items and state the names of the individuals.

**6. Do you want to exclude any individuals from your will?** \_\_\_\_ Yes \_\_\_\_ No. If yes, state the full name of each person to be disinherited:

\*\*\* Do you want to disinherit an individual if he or she contests your will?  
\_\_\_\_ Yes \_\_\_\_\_ No

**7. Who do you want to be your Executor (the person that would administer your estate)?** If your Spouse, check here \_\_\_\_\_. If some other person, then state the full name and address of the person: \_\_\_\_\_.

Would you like to name an alternate Executor in case the person that you have named is unable or unwilling to perform the duties? \_\_\_\_ Yes, \_\_\_\_\_ (name) \_\_\_\_ No

**8. Do you have any special requests for your funeral or burial?** \_\_\_\_ Yes \_\_\_\_\_ No

Specific Cemetery: \_\_\_\_\_

Specific directions for your funeral: \_\_\_\_\_

\_\_\_\_\_

Cremation: \_\_\_\_ Yes \_\_\_\_\_ No