

ESTATE PLANNING WORKSHEET

Chris Parvin, J.D., LL.M.
Board Certified, *Estate Planning & Probate Law*
Texas Board of Legal Specialization



Market Ross Place
1701 N. Market St., Suite 404
Dallas, Texas 75202
(469) 607-4500 Main
(469) 607-4503 Direct Voice & Fax
chris@parvinlaw.com

www.parvinlaw.com

PARVIN LAW GROUP, P.C.

◆ 1701 N. Market St., Suite 404; Dallas, Texas 75202 ◆ Phone: 469-607-4500 ◆

www.parvinlaw.com

DIRECTIONS FOR COMPLETION:

Thank you for entrusting your Estate Planning to our firm. We appreciate the opportunity to assist you and look forward to promptly completing your plan.

Please complete this worksheet and return to our office as soon as possible. For your convenience, we accept this worksheet from our clients by email or fax as well as U.S. Mail or courier. If you send to us by email or fax, please confirm our receipt of the document after you have sent it by calling our offices at 469-607-4500.

If you transmit this document by email, please send it to intake@parvinlaw.com.

If you send it by fax, please fax to (469) 697-4503 (Direct Voice & Fax).

We are here to help you at every step. Though this worksheet is designed to be a simple-to-answer document to help us draft your plan, if you find any of these questions too difficult to answer or if you are unsure how to respond, please feel free to leave the answer blank and note your question. Mr. Parvin, or an attorney at our firm, will contact you to discuss any questions you may have.

Upon our receipt of this completed worksheet, we will review the document and begin drafting your plan. Our office will be in contact with you to schedule an appointment for Mr. Parvin, or an attorney at our firm, to review the plan with you and execute all documents. Again, if you have any questions or concerns, please do not hesitate to contact us.

Thank you,

PARVIN LAW GROUP, P.C.

FACT FINDER – MARRIED COUPLE

Client's Name:		DOB:	SSN:
AKA, if any:			
Spouse's Name:		DOB:	SSN:
AKA, if any:			
Address:			
City:	State:	Zip:	
County:	Home Phone:	Client's Cell:	
	Fax:	Spouse's Cell:	

Client's Employer:	Occupation:
Work Address:	Work Phone:
Client's email:	Work fax:
Spouse's Employer:	Occupation:
Work Address:	Work Phone:
Spouse's email:	Work fax:

Any deceased children? Yes No If yes, specify below and include living descendants of the deceased child(ren)
 Include future children? Yes No
 Is this the client's first marriage? Yes No: _____

Who is parent?	Full Name of Child:	Age of Child	Gender	Any grandchildren?
1				
2				
3				
4				
5				
6				

Who is parent?	Full Name of GrandChild:	Age of Child	Gender
1			
2			
3			
4			
5			
6			

Medical Power of Attorney

Client: Prepare Medical Power of Attorney? ___ Yes ___ No	Spouse: Prepare Medical Power of Attorney? ___ Yes ___ No
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	Client's [agents / attorneys in fact]	Spouse's [agents / attorneys in fact]
1 st [agent / attorney in fact]'s Name		
Street Address		
City, State, Zip		
Phone		
2 nd [agent / attorney in fact]'s Name		
Street Address		
City, State, Zip		
Phone		
3 rd [agent / attorney in fact]'s Name		
Street Address		
City, State, Zip		
Phone		
4 th [agent / attorney in fact]'s Name		
Street Address		
City, State, Zip		
Phone		

Restrict decision-making authority of the [agents / attorneys in fact]? ___ Yes ___ No
Duration of the [Medical Power of Attorney]? ___ Indefinite ___ Only until _____
Where will the original be kept?

HIPAA Release

Prepare for both spouses Prepare for Client only Prepare for Spouse only Client already has them Client doesn't want them

Client's [agents / attorneys in fact]

Spouse's [agents / attorneys in fact]

1st [agent / attorney in fact]'s Name

Street Address

City, State, Zip

Phone

2nd [agent / attorney in fact]'s Name

Street Address

City, State, Zip

Phone

3rd [agent / attorney in fact]'s Name

Street Address

City, State, Zip

Phone

4th [agent / attorney in fact]'s Name

Street Address

City, State, Zip

Phone

Should [agents / attorneys in fact] serve in succession or as a group?

In succession

As a group

Statutory Durable Power of Attorney

Prepare for both spouses
 Prepare for Client only
 Prepare for Spouse only
 Client already has them
 Client doesn't want them

Client's [agents / attorneys in fact]

Spouse's [agents / attorneys in fact]

1st [agent / attorney in fact]'s Name

Street Address

City, State, Zip

Phone

Relationship

2nd [agent / attorney in fact]'s Name

Street Address

City, State, Zip

Phone

Relationship

3rd [agent / attorney in fact]'s Name

Street Address

City, State, Zip

Phone

Relationship

4th [agent / attorney in fact]'s Name

Street Address

City, State, Zip

Phone

Relationship

Statutory Durable Power of Attorney – Client

Include power to make gifts?	<input type="checkbox"/> Yes, only annual exclusion gifts	<input type="checkbox"/> Yes, annual exclusion gifts, plus larger gifts	<input type="checkbox"/> No gifts
If yes to Annual Exclusion Gifts, to whom may annual exclusion gifts be made?	<input type="checkbox"/> Anyone	<input type="checkbox"/> Only specified persons:	<input type="checkbox"/> Descendants
			<input type="checkbox"/> Spouse
			<input type="checkbox"/> Descendants' spouses
			<input type="checkbox"/> Parents
			<input type="checkbox"/> Others: _____
If yes to Larger Gifts, to whom may larger gifts be made?	<input type="checkbox"/> Only to descendants	<input type="checkbox"/> To descendants and charities	
How extensive to you want to draft the power to make gifts?	<input type="checkbox"/> Limit to when needed to save taxes		<input type="checkbox"/> No limit
Give agent power to make transfers and gifts to qualify for SSI and Medicaid?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Limit gifts by agent to himself or herself to greater of \$5,000 or 5% of the estate's value (to prevent agent from having general power over the estate)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Give agent power to change beneficiaries on life insurance and retirement accounts?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Do you want to specifically identify one or more pieces of real estate?	<input type="checkbox"/> Yes – How many? _____		<input type="checkbox"/> No
Also draft:	<input type="checkbox"/> Notice to person executing the power of attorney	<input type="checkbox"/> Notice to person accepting appointment as agent	<input type="checkbox"/> Certification of Agent
		<input type="checkbox"/> Affidavit of Physician	<input type="checkbox"/> [State] Estates Code Provisions

When effective?	<input type="checkbox"/> Immediately	<input type="checkbox"/> Upon incapacity or disability	<input type="checkbox"/> Decide at signing
Record the POA?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Multiple agents act:	<input type="checkbox"/> Jointly	<input type="checkbox"/> May act separately	
Additional powers?	<input type="checkbox"/> Take legal action to enforce	<input type="checkbox"/> Create, modify or revoke a Rev Trust	<input type="checkbox"/> Deal with community property
	<input type="checkbox"/> Natural Resources	<input type="checkbox"/> Appoint new agent	<input type="checkbox"/> Pay agent a fee
	<input type="checkbox"/> Deal with IRS	<input type="checkbox"/> Fund a trust not created by client	<input type="checkbox"/> Reject or disclaim property
	<input type="checkbox"/> Create or change survivorship interest	<input type="checkbox"/> Change beneficiary designations	<input type="checkbox"/> Make loans to agent
	<input type="checkbox"/> Digital assets	<input type="checkbox"/> All other powers	
Revoke existing POA?	<input type="checkbox"/> No	<input type="checkbox"/> Yes, specify which one	<input type="checkbox"/> Yes, revoke all prior
		Type: _____	
		Add recording info? _____	
		Did witnesses sign? <input type="checkbox"/> Yes <input type="checkbox"/> No	

Notes:

Statutory Durable Power of Attorney - Spouse (continued)

Include power to make gifts?	<input type="checkbox"/> Yes, only annual exclusion gifts	<input type="checkbox"/> Yes, annual exclusion gifts, plus larger gifts	<input type="checkbox"/> No gifts
If yes to Annual Exclusion Gifts, to whom may annual exclusion gifts be made?	<input type="checkbox"/> Anyone	<input type="checkbox"/> Only specified persons:	<input type="checkbox"/> Descendants <input type="checkbox"/> Spouse <input type="checkbox"/> Descendants' spouses <input type="checkbox"/> Parents <input type="checkbox"/> Others: _____
If yes to Larger Gifts, to whom may larger gifts be made?	<input type="checkbox"/> Only to descendants	<input type="checkbox"/> To descendants and charities	
How extensive to you want to draft the power to make gifts?	<input type="checkbox"/> Limit to when needed to save taxes		<input type="checkbox"/> No limit
Give agent power to make transfers and gifts to qualify for SSI and Medicaid?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Limit gifts by agent to himself or herself to greater of \$5,000 or 5% of the estate's value (to prevent agent from having general power over the estate)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
How to draft?	<input type="checkbox"/> Statutory form	<input type="checkbox"/> General POA	
Do you want to specifically identify one or more pieces of real estate?	<input type="checkbox"/> Yes – How many? _____		<input type="checkbox"/> No
Also draft:	<input type="checkbox"/> Notice to person executing the power of attorney	<input type="checkbox"/> Notice to person accepting appointment as agent	<input type="checkbox"/> Certification of Agent <input type="checkbox"/> Affidavit of Physician <input type="checkbox"/> Texas Probate Code Provisions

When effective?	<input type="checkbox"/> Immediately	<input type="checkbox"/> Upon incapacity or disability	<input type="checkbox"/> Decide at signing	
Record the POA?	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
Multiple agents act:	<input type="checkbox"/> Jointly	<input type="checkbox"/> May act separately		
Additional powers?	<input type="checkbox"/> Take legal action to enforce <input type="checkbox"/> Natural Resources <input type="checkbox"/> Deal with IRS <input type="checkbox"/> Create or change survivorship interest <input type="checkbox"/> Digital assets	<input type="checkbox"/> Create, modify or revoke a Rev Trust <input type="checkbox"/> Appoint new agent <input type="checkbox"/> Fund a trust not created by client <input type="checkbox"/> Change beneficiary designations <input type="checkbox"/> All other powers	<input type="checkbox"/> Deal with community property <input type="checkbox"/> Pay agent a fee <input type="checkbox"/> Reject or disclaim property <input type="checkbox"/> Make loans to agent	
Revoke existing POA?	<input type="checkbox"/> No	<input type="checkbox"/> Yes, specify which one Type: _____ Add recording info? _____ Did witnesses sign? <input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes, revoke all prior

Notes:

Revocation of Power of Attorney

Prepare for both spouses Prepare for Client only Prepare for Spouse only Client doesn't want them

Client:

Which type of POA is being revoked? Durable POA General POA Limited POA
 Statutory Durable POA Uniform Statutory Form POA Other: _____

Did witnesses sign the POA being revoked? Yes – Who were they? _____ No

Do you want the Revocation to be witnessed? Yes No

Spouse:

Which type of POA is being revoked? Durable POA General POA Limited POA
 Statutory Durable POA Uniform Statutory Form POA Other: _____

Did witnesses sign the POA being revoked? Yes – Who were they? _____ No

Do you want the Revocation to be witnessed? Yes No

Appointment of Guardian - Adult

Prepare for both spouses
 Prepare for Client only
 Prepare for Spouse only
 Client already has them
 Client doesn't want them

	Client's Guardian of Person		Spouse's Guardian of Person	
	Name	Relation	Name	Relation
1 st Guardian of Person				
2 nd Guardian of Person				
3 rd Guardian of Person				
4 th Guardian of Person				

	Client's Guardian of Estate		Spouse's Guardian of Estate	
	Name	Relation	Name	Relation
1 st Guardian of Estate				
2 nd Guardian of Estate				
3 rd Guardian of Estate				
4 th Guardian of Estate				

	Client's Disqualified Guardian		Spouse's Disqualified Guardian	
	Name	Relation	Name	Relation
1 st Disqualified Guardian				
2 nd Disqualified Guardian				
3 rd Disqualified Guardian				
4 th Disqualified Guardian				

Appointment of Guardian for Minor Children

Prepare for both spouses
 Prepare for Client only
 Prepare for Spouse only
 Client already has them
 Client doesn't want them

Client's Guardians:

	Name of Guardian (Co-guardians may be named if they are married)	Relation
1 st Guardian(s)	a.	
	b.	
2 nd Guardian(s)	a.	
	b.	
3 rd Guardian(s)	a.	
	b.	
4 th Guardian(s)	a.	
	b.	

Which children will be included?

Include afterborn? Yes No

Spouse's Guardians:

	Name of Guardian (Co-guardians may be named if they are married)	Relation
1 st Guardian(s)	a.	
	b.	
2 nd Guardian(s)	a.	
	b.	
3 rd Guardian(s)	a.	
	b.	
4 th Guardian(s)	a.	
	b.	

Which children will be included?

Include afterborn? Yes No

Wills

Client's Executor(s)

Spouse's Executor(s)

	Name	Relation	Name	Relation
1 st Set	a.		a.	
	b.		b.	
	c.		c.	
2 nd Set	a.		a.	
	b.		b.	
	c.		c.	
3 rd Set	a.		a.	
	b.		b.	
	c.		c.	
4 th Set	a.		a.	
	b.		b.	
	c.		c.	

Client's Trustee(s)

Spouse's Trustee(s)

	Name	Relation	Name	Relation
1 st Set	a.		a.	
	b.		b.	
	c.		c.	
2 nd Set	a.		a.	
	b.		b.	
	c.		c.	
3 rd Set	a.		a.	
	b.		b.	
	c.		c.	
4 th Set	a.		a.	
	b.		b.	
	c.		c.	

SIMPLE WILL (SHORT AND LONG)
Client

PRIMARY BENEFICIARIES:

- Spouse
- Descendants
- Equal shares to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
- Various percentages to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
- One or more beneficiaries in succession (go to Equal Shares/Percentages/In Succession page)

CONTINGENT BENEFICIARIES -- IF PRIMARY BENEFICIARY IS SPOUSE:

- Descendants, or if none to:
 - To Client's heirs
 - To Spouse's heirs
 - Half to each spouse's heirs
 - Equal shares to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
 - Various percentages to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
 - One or more beneficiaries in succession (go to Equal Shares/Percentages/In Succession page)
- Equal shares to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
- Various percentages to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
- One or more beneficiaries in succession (go to Equal Shares/Percentages/In Succession page)

CONTINGENT BENEFICIARIES -- IF PRIMARY BENEFICIARY IS DESCENDANTS:

- If no descendants alive to:
 - To Client's heirs
 - To Spouse's heirs
 - Half to each spouse's heirs
 - Equal shares to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
 - Various percentages to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
 - One or more beneficiaries in succession (go to Equal Shares/Percentages/In Succession page)

Notes:

Specific Bequests

FIRST BEQUEST	Recipient: _____	Indicate type of gift:	
	Relation: _____	<input type="checkbox"/> Animal	<input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No
	Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will	<input type="checkbox"/> Cash of \$_____	<input type="checkbox"/> Life estate in homestead
	When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die	<input type="checkbox"/> Homestead outright	<input type="checkbox"/> Real estate outright
	Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Stock: _____ shares of _____	<input type="checkbox"/> Other: _____
	If recipient not alive, what happens to gift?	Further describe gift:	
	<input type="checkbox"/> Gift lapses	_____	
	<input type="checkbox"/> Gift passes to recipient's descendants	_____	
	<input type="checkbox"/> Gift passes to recipient's spouse	_____	
	<input type="checkbox"/> Gift passes to someone else: _____	_____	

SECOND BEQUEST	Recipient: _____	Indicate type of gift:	
	Relation: _____	<input type="checkbox"/> Animal	<input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No
	Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will	<input type="checkbox"/> Cash of \$_____	<input type="checkbox"/> Life estate in homestead
	When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die	<input type="checkbox"/> Homestead outright	<input type="checkbox"/> Real estate outright
	Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Stock: _____ shares of _____	<input type="checkbox"/> Other: _____
	If recipient not alive, what happens to gift?	Further describe gift:	
	<input type="checkbox"/> Gift lapses	_____	
	<input type="checkbox"/> Gift passes to recipient's descendants	_____	
	<input type="checkbox"/> Gift passes to recipient's spouse	_____	
	<input type="checkbox"/> Gift passes to someone else: _____	_____	

THIRD BEQUEST	Recipient: _____	Indicate type of gift:	
	Relation: _____	<input type="checkbox"/> Animal	<input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No
	Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will	<input type="checkbox"/> Cash of \$_____	<input type="checkbox"/> Life estate in homestead
	When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die	<input type="checkbox"/> Homestead outright	<input type="checkbox"/> Real estate outright
	Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Stock: _____ shares of _____	<input type="checkbox"/> Other: _____
	If recipient not alive, what happens to gift?	Further describe gift:	
	<input type="checkbox"/> Gift lapses	_____	
	<input type="checkbox"/> Gift passes to recipient's descendants	_____	
	<input type="checkbox"/> Gift passes to recipient's spouse	_____	
	<input type="checkbox"/> Gift passes to someone else: _____	_____	

FOURTH BEQUEST	Recipient: _____	Indicate type of gift:	
	Relation: _____	<input type="checkbox"/> Animal	<input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No
	Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will	<input type="checkbox"/> Cash of \$_____	<input type="checkbox"/> Life estate in homestead
	When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die	<input type="checkbox"/> Homestead outright	<input type="checkbox"/> Real estate outright
	Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Stock: _____ shares of _____	<input type="checkbox"/> Other: _____
	If recipient not alive, what happens to gift?	Further describe gift:	
	<input type="checkbox"/> Gift lapses	_____	
	<input type="checkbox"/> Gift passes to recipient's descendants	_____	
	<input type="checkbox"/> Gift passes to recipient's spouse	_____	
	<input type="checkbox"/> Gift passes to someone else: _____	_____	

FIFTH BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright <input type="checkbox"/> Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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SIXTH BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright <input type="checkbox"/> Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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SEVENTH BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright <input type="checkbox"/> Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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EIGHTH BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright <input type="checkbox"/> Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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Equal Shares**Percentages****In Succession**

Benef 1: _____

___ Person, or if not alive to:

- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses

Benef 2: _____

___ Person, or if not alive to:

- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses

Benef 3: _____

___ Person, or if not alive to:

- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses

Benef 4: _____

___ Person, or if not alive to:

- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses

Benef 1: _____

Relation: _____ Share: _____

___ Person, or if not alive to:

- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses
- ___ Married Couple, or if both not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other benefs pro rata

Benef 2: _____

Relation: _____ Shares: _____

___ Person, or if not alive to:

- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses
- ___ Married Couple, or if both not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other benefs pro rata

Benef 3: _____

Relation: _____ Shares: _____

___ Person, or if not alive to:

- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses
- ___ Married Couple, or if both not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other benefs pro rata

Benef 1: _____

___ Person, or if not alive to:

- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 2: _____

___ Person, or if not alive to:

- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 3: _____

___ Person, or if not alive to:

- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 4: _____

___ Person, or if not alive to:

- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 5: _____

___ Person, or if not alive to:

- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 6: _____

___ Person, or if not alive to:

- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 7: _____

___ Person, or if not alive to:

- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

How to distribute property if all beneficiaries named above are dead or not in existence (for a charity)?

- ___ To Client's heirs
- ___ To Spouse's heirs

- ___ Half to each spouse's heirs
- ___ Do not address this issue

- ___ To one charity
- ___ To several charities in equal shares

Details : _____

For Wills with separate share trusts, should property distributed to the Contingent Beneficiaries be held in individual trusts for their benefit?

___ Yes, but only for client's descendants

___ Yes, for all contingent beneficiaries ___ No

SIMPLE WILL (SHORT AND LONG)

Spouse

PRIMARY BENEFICIARIES:

- Spouse
- Descendants
- Equal shares to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
- Various percentages to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
- One or more beneficiaries in succession (go to Equal Shares/Percentages/In Succession page)

CONTINGENT BENEFICIARIES -- IF PRIMARY BENEFICIARY IS SPOUSE:

- Descendants, or if none to:
- To Client's heirs
- To Spouse's heirs
- Half to each spouse's heirs
- Equal shares to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
- Various percentages to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
- One or more beneficiaries in succession (go to Equal Shares/Percentages/In Succession page)

CONTINGENT BENEFICIARIES -- IF PRIMARY BENEFICIARY IS DESCENDANTS:

- If no descendants alive to:
- To Client's heirs
- To Spouse's heirs
- Half to each spouse's heirs
- Equal shares to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
- Various percentages to several beneficiaries (go to Equal Shares/Percentages/In Succession page)
- One or more beneficiaries in succession (go to Equal Shares/Percentages/In Succession page)

Notes:

Specific Bequests

FIRST BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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SECOND BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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THIRD BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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FOURTH BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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FIFTH BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright <input type="checkbox"/> Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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SIXTH BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright <input type="checkbox"/> Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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SEVENTH BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright <input type="checkbox"/> Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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EIGHTH BEQUEST	Recipient: _____ Relation: _____ Add to: <input type="checkbox"/> Both Wills <input type="checkbox"/> Client's Will <input type="checkbox"/> Spouse's Will When made? <input type="checkbox"/> At spouse's death <input type="checkbox"/> After both spouses die Reduce gift by half if spouses die together? <input type="checkbox"/> Yes <input type="checkbox"/> No If recipient not alive, what happens to gift? <input type="checkbox"/> Gift lapses <input type="checkbox"/> Gift passes to recipient's descendants <input type="checkbox"/> Gift passes to recipient's spouse <input type="checkbox"/> Gift passes to someone else: _____	Indicate type of gift: <input type="checkbox"/> Animal <input type="checkbox"/> Animal with \$_____ Hold money in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash of \$_____ <input type="checkbox"/> Life estate in homestead <input type="checkbox"/> Homestead outright <input type="checkbox"/> Real estate outright <input type="checkbox"/> Stock: _____ shares of _____ <input type="checkbox"/> Other: _____ Further describe gift: _____ _____
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Equal Shares

Percentages

In Succession

Benef 1: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses

Benef 2: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses

Benef 3: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses

Benef 4: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses

Benef 1: _____

Relation: _____ Share: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses
- ___ Married Couple, or if both not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other benefs pro rata

Benef 2: _____

Relation: _____ Shares: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses
- ___ Married Couple, or if both not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other benefs pro rata

Benef 3: _____

Relation: _____ Shares: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other beneficiaries pro rata
- ___ Spouse, then desc, then other benefs pro rata
- ___ Spouse, then other benefs pro rata
- ___ Charity, or if not in existence to:
- ___ Other benefs pro rata
- ___ Executor chooses a similar charity
- ___ Gift lapses
- ___ Married Couple, or if both not alive to:
- ___ Descendants, then to other benefs pro rata
- ___ Other benefs pro rata

Benef 1: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 2: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 3: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 4: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 5: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 6: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

Benef 7: _____

- ___ Person, or if not alive to:
- ___ Descendants, then to next benef
- ___ Next beneficiary
- ___ Charity

How to distribute property if all beneficiaries named above are dead or not in existence (for a charity)?

To Client's heirs Half to each spouse's heirs To one charity
 To Spouse's heirs Do not address this issue To several charities in equal shares

Details : _____

For Wills with separate share trusts, should property distributed to the Contingent Beneficiaries be held in individual trusts for their benefit? Yes, but only for client's descendants Yes, for all contingent beneficiaries No