

LAST WILL & TESTAMENT ORGANIZER

rev. 1/1/2008

1. PERSONAL INFORMATION

Full Name	Social Security Number	Date of Birth	Home Telephone Number	E-Mail Address
Full Street Address	City / Town	State	Zip Code	Cell No.

2. SPOUSE INFORMATION (IF SINGLE - MARK "N/A")

Spouse's Full Name	Social Security Number	Date of Birth	E-Mail Address	Cell No.

3. CHILDREN, GRANDCHILDREN, PARENTS & SIBLINGS (attach additional page if necessary)

Family Member Name	How Related?	Social Security Number	Date of Birth	Living?	Street, City, Zip Code

4. ANY SPECIFIC BEQUESTS BEING MADE? (e.g. rolex watch to son, wedding ring to sister, art to cousin, cash to charities, etc.)

List Personal Item(s) or Cash Grant(s)	Beneficiary	Relationship	Alternate Beneficiary	Relationship

5. WHO DO YOU LEAVE THE BALANCE OF YOUR ASSETS? (technically called the "Residuary Estate")

Name of Primary Beneficiary	\$ Amount or % Allocated	Contingent Beneficiary	\$ Amount or % Allocated	Notes

6. WHO SHOULD MANAGE YOUR WILL AND ESTATE WHEN YOU ARE DECEASED? (a/k/a "Personal Representative" or "Executor")

Whom do you name as your Personal Representative? Who is your alternate if your first choice is unable to act?

First Choice to Be Executor (specify if co-executors being named)	1st Alternate if Primary Executor Unable	2nd Alternate If 1st Alternate Unable

7. DO YOU WANT TO BE BURIED OR CREMATED? DO YOU WANT YOUR ORGANS DONATED?

Upon your death, are there any specific instructions to be carried out (i.e. cremation, spreading of ashes, organ/eye/tissue donation)?

8. MINOR BENEFICIARY - APPOINTMENT OF GUARDIAN & ESTABLISHING A TRUST FOR SUCH MINORS UNTIL A CERTAIN AGE

If, at the time of your death, a guardian is needed to care for minor children, whom do you name? Also provide the name of an alternate guardian.

Do you wish to establish a trust for a minor (specify an age between 18-25 when the trust must distribute the assets to the minor)?

Whom do you name as trustee of this "Minor Trust"? Who is your alternate if your first choice is unable to act as trustee of this Minor Trust?

	NAME OF GUARDIAN - RELATIONSHIP TO MINOR (e.g. Aunt, Uncle, Grandparent)	NAME OF TRUSTEE TO MANAGE THE MINOR'S TRUST FUND	At What Age Should Minor Get Trust Funds
Primary			
Alternate #1			
Alternate #2			