

Legal Plan, if applicable (leave blank if you do not have a legal plan):
Plan name:
Member's name:
Last 4 of SS #:
Membership #:
Intake or Case number(s), if applicable:

# Couples Will Worksheet

The person making a will is known as the Testator. The person or persons who inherit the Testator's property are known as the Beneficiaries. The person who is responsible for seeing that the terms of the will are carried out is known as the Personal Representative. If a trust is created in the will (usually for minor children), the person who holds and manages property for the benefit of the children is the Trustee. Also in the case of minor children, the person who has physical custody of them (in the event of the death of both parents) is known as the Guardian. The Personal Representative, trustee, and guardian can all be the same person or the Testator may designate different persons for different tasks.

A typical estate plan for an individual who is married and has minor children is to leave everything to the spouse and if he or she should fail to survive the Testator, then to a Trustee for the benefit of the minor children or grandchildren until they reach a certain age (18, 21, 25, etc.).

How were you referred to us?						
Does your total estate including reti	rement and in	surance p	roceeds, exceed	\$5,000,000?	Yes	No
Partner 1 CompleteLegalName:						
Date of Birth:						
Email:	Phone:_	Home		Cell		Work
Preferred method of contact:		_				
Partner 2 CompleteLegal Name:						
Date of Birth:	Phone:_	Home		Cell		Work
Email:		Home		CCII		WOTK
Preferred method of contact:						
Home Address:						
City:	State:		Zip Code:	(	County:	



# Living Children

Full Legal Name of Child		Date of Birth:		
Relationship:				
this marriage	husband's prior marriage	wife's prior marriage	unmarried relationship	
Full Legal Name of Child		Date o	of Birth:	
Relationship:				
this marriage	husband's prior marriage	wife's prior marriage	unmarried relationship	
Full Legal Name of Child		Date o	of Birth:	
Relationship:				
this marriage	husband's prior marriage	wife's prior marriage	unmarried relationship	
Full Legal Name of Child		Date o	of Birth:	
Relationship:				
this marriage	husband's prior marriage	wife's prior marriage	unmarried relationship	
Deceased Children				
Full Legal Name of Child		Date o	of Birth:	
		Date o	of Death:	
Relationship:				
this marriage	husband's prior marriage	wife's prior marriage	unmarried relationship	
Full Legal Name of Child		Date o	of Birth:	
		Date o	of Death:	
Relationship:				
this marriage	hushand's prior marriage	wife's prior marriage	unmarried relationship	



## Will Provisions

#### **Burial or Cremation Preferences**

	Partner 1	Partner 2
Burial or Cremation	Burial	Burial
	Cremation	Cremation
Do you wish to donate your organs?	Yes	Yes
	No	No
Specific Place for Burial or Disposition of Ashes.	Burial	Burial
	Next to:	Next to:
	Ashes Interred	A Ashes Interred
	Next to:	Next to:
	Ashes scattered	Ashes scattered
	Where	Where
	Other instructions:	Other instructions:



#### Tangible Personal Property

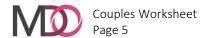
General Gift of All Tangible Personal Property (Tangible Personal Property includes furniture, furnishings, clothing, jewelry, china, silver, crystal, automobiles, boats, collectibles, etc. Note: We typically add a paragraph in the will stating: "I may leave among my personal papers a memorandum identifying certain items of my tangible personal property for distribution at my death to one or more persons"

	Partner 1	Partner 2
All Tangible Personal Property goes to Spouse, and if Spouse is deceased to Children in equal shares, and if a Child is deceased, then to their Children	Choose This Option	Choose This Option
All Tangible Personal Property Goes to Spouse, and if spouse is deceased, to Children and Step-children in equal shares .If a Child/or Step-child is deceased, then the their portion goes to their children.	Choose This Option	Choose This Option
All Tangible Personal Property goes to Spouse, and if Spouse is deceased, to other beneficiaries (please provide details).	Choose This Option% to: % to: % to: % to: % to:	Choose This Option % to: % to: % to:  % to:
If one of the beneficiaries is deceased, then their portion shall go to successor beneficiary listed.	Successor beneficiaries:	Successor beneficiaries:
+Other: Please list your own preferences for who should receive your Tangible Personal Property. Please provide details		

#### Gifts of Specific Items of Tangible Personal Property

Please list any Tangible Personal Property that you want to leave to someone other than your Spouse, even if your spouse is alive. Or that you want to leave to a specific child or other beneficiary after your spouse is deceased.

Description of Personal Property Item	Name of Beneficiary	City and State Where Beneficiary Resides	Relationship to Beneficiary



# Real Property (Real Estate)

### General Gift of All Real Property

This includes your principal residence and all other real estate you own (e.g., vacation home, investment property, etc.)

	Preferences	Comments
All Real Property goes to Children in equal shares, and if Children are deceased, then to their Children.	Choose This Option	
All Real Property goes to Children and if a Child is deceased, then the remaining survivors shall split that Child's portion.	Choose This Option	
All Real Property shall be split as indicated:  If one of the beneficiaries is deceased, then their portion shall go to the successor beneficiary listed:	Choose This Option % to:% to:% to: Successor beneficiaries:	
I wish for the property to be sold and added	Choose This Option	
to my residue estate.  Other: Please list your own preferences for	Choose This Option	
who should receive your Real Property. Please provide details in the comments section.		



#### Residue

Residue includes all other assets passing under your will, as part of your probate estate such as bank or brokerage accounts in your individual name, and stocks or bonds in your individual name.

	Preferences	Comments
All Residue goes to Children in equal shares, and if Children are deceased, then to their Children.	Check to Choose This Option	
All Residue goes to Children and if a Child is deceased, then the remaining survivors shall split that Child's portion.	Check to Choose This Option	
All Residue shall be split as indicated:	Choose This Option	
	% to:	
If one of the beneficiaries is deceased, then their portion shall go to the Successor beneficiary listed.	Successor beneficiaries:	
Other: Please list your own preferences for who should receive your residue. Please provide details in the comments section.	Choose This Option	
Place the Residue in a Trust.	Choose This Option	

What if all Tangible, Real Estate and Residue beneficiaries (e.g. Your children, grandchildren and Specific beneficiaries) die before receiving the principal? Who should receive the remaining Assets?

My closest living heirs-at-law, under Georgia law

Specify list of beneficiaries and amounts or percentages to each



### Terms of Trusts (only if applicable to your estate plan)

Typically, we include a trust for any will that includes young children. If you have chosen to include Trusts in your estate plan, please make one the following additional choices. Note: We recommend using the age of 25 as the youngest age to start with.

All in One Payment	Two Payments	Three Payments
Age for Payment	Age for 1 <sup>st</sup> Payment	Age for 1 <sup>st</sup> Payment
	Percentage of Total Paid in 1st Payment%	Percentage of Total Paid in 1 <sup>st</sup> Payment%
	Age for 2 <sup>nd</sup> Payment	Age for 2 <sup>nd</sup> Payment
	Percentage of Total Paid in 2 <sup>nd</sup>	Percentage of Total Paid in 2 <sup>nd</sup> Payment%
	Payment <b>Entire Remainder</b>	
		Age for 3rd Payment
		Percentage of Total Paid in 3rd
		Payment Entire Remainder

What if all Trust beneficiaries (e.g. your children) die before receiving the entire Trust principal? Who should receive any remaining Trust Assets?

The Trust beneficiary's estate.

To the Trust beneficiary's descendants and if no children, revert back to the residue section in my will

My closest living heirs-at-law, under Georgia law

Specify list of beneficiaries and amounts or percentages to each

#### Trustee

Please list who you would nominate for the following positions and their relationship to you

	Partner 1		Partner 2	
	Designee	Your Relationship	Designee	Your Relationship
Personal				
Representative				
a/k/a Executor				
Alternate Personal				
Representative(s)				
Trustee(s)				
Alternate Trustee(s)				



## Guardian of Minor Children

Who will serve as Guardians of your minor children (if applicable)? **Note:** If the Mother or Father are living, they will automatically be appointed Guardian, unless there are extenuating circumstances.

	Partner 1	Partner 2
Primary Guardian	Full Name:	Full Name:
	Relationship:	Relationship:
	City and State of Residence:	City and State of Residence:
	Should their spouse serve as Co-guardian? If so,	Should their spouse serve as Co-guardian? If so,
	please fill in:	please fill in:
	Full name of Spouse:	Full name of Spouse:
	If you wish to have your appointed Guardian's spouse appointed as Co-guardian, are you comfortable with only one of the Guardians named serving as sole Guardian if the Guardian named or their spouse is deceased?  Yes No	If you wish to have your appointed Guardian's spouse appointed as Co-guardian, are you comfortable with only one of the Guardians named serving as sole Guardian if the Guardian named or their spouse is deceased?  Yes No
Secondary	Full Name:	Full Name:
Guardian	Relationship:	Relationship:
	City and State of Residence:	City and State of Residence:
	Should their spouse serve as Co-guardian? If so,	Should their spouse serve as Co-guardian? If so,
	please fill in:	please fill in:
	Full name of Spouse:	Full name of Spouse:
	   If you wish to have your appointed Guardian's	   If you wish to have your appointed Guardian's
	spouse appointed as Co-guardian, are you	spouse appointed as Co-guardian, are you
	comfortable with only one of the Guardians	comfortable with only one of the Guardians
	named serving as sole Guardian if the Guardian	named serving as sole Guardian if the Guardian
	named or their spouse is deceased?	named or their spouse is deceased?
	Yes No	Yes No
	I	I



#### Advance Directive and Power of Attorney

In addition to a will, we can prepare an Advance Directive for Health Care, which combines the two documents that were formerly executed as a living will and a durable health care power of attorney, into one form. We can also prepare a General Power of Attorney. The Advance Directive provides for an enforceable expression of your desire not to be sustained on life support systems if you are in a terminal condition and unable to speak for yourself and expresses your wishes in the face of the need for life sustaining treatment or resuscitation. It also appoints someone to act as your health care agent in the event you cannot speak for yourself. It allows someone to "step into your shoes" to manage anything health care related on your behalf (including access to medical records).

If you wish to have an Advanced Directive, please designate the individual (agent) that you wish to make health care decisions, and a successor *if so desired*:

#### Advanced Directive

Partner 1		Partner 2
Designee Name:		Designee Name:
Address:		Address:
Phone #s Cell	Work	Phone #s
Email:		
Successor #1 Name:		Successor #1 Name:
Address:		Address:
Phone #s	Work	Phone #s
Email:		
Successor #2 Name:		_ Successor #2 Name:
Address:		Address:
Phone #s	Work	Phone #s
Email:		Email:



#### **General Power of Attorney**

The **General Power of Attorney** gives to another individual the broadest possible legal authority to act in your name are incapacitated (for example, if you were temporarily disabled and needed someone to pay your bills in the interi can be drafted to be immediately effective or only in the event of your subsequent incompetence or disability. If you wish to have a General Power of Attorney, please designate the individual you wish to act as your agent and a successor, *if so desired*:

D- utu - u 4	n-			
Partner 1	Pa	rtner 2		
Designee Name:	De	signee Name:		
Address:	Ac	dress:		
Phone #s Home Cell	Ph	one #s		
Home Cell	Work	Home	Cell	Work
Email:	En	nail:		
Successor #1 Name:	Su	ccessor #1 Name:		
Address:		dress:		
Phone #s	Ph	one #s	Cell	Work
Email:				
Linuii		nail:		
C	6			
Successor #2 Name:		ccessor #2 Name:		
Address:	Ac	dress:		
Phone #s	Ph	one #s	Cell	\\\l.
Tionic Gen	Work	Home		Work
Email:	En	nail:		

Partner 1		Partner 2		
Asset	Beneficiary(ies)	Asset	Beneficiary(ies)	