Ditchen & Associates Law Firm



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

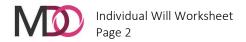
Individual Will Worksheet

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. The Testator may also designate more than one person to act as Co-Personal Representatives, Co-Trustees, or Co-Guardians.

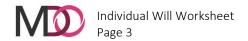
A typical estate plan for an individual who has minor children is to leave everything to a Trustee for the benefit of the minor children or grandchildren until they reach a certain age (18, 21, 25, etc.). A more sophisticated estate plan is required for persons who have large estates (generally defined as being in excess of \$5,000,000 inclusive of life insurance proceeds and all property).

Does your total estate including retirement and insurance proceeds, exceed \$5,000,000? Yes No

Please print or type the fol	lowing requested	information for the creation	on of your will package:
Complete Legal Name:			
Date of Birth:			
Home Address:			
City	State	Zip Code	County of Residence:
Contact Information:			
Home Number:		Work Number:	
Cell Number:		E-Mail Address:	
Preferred Method of Contac	+•		



Living Children			
Children Complete Legal Name		Date of Birth	
Deceased Children Children Complete Legal Name		Date of Birth	Date of Death
Will Provisions Burial or Cremation Preferences			
Burial or Cremation?	Burial	Crematic	on
Do you wish to donate your organs?	Yes	No	
Specific Place for Burial or Disposition of Ashes?	Burial n	ext to	
	Ashes Ir	nterred next to	
	Ashes S	cattered in	
	Other		
Other specific Burial or Cremation Requests, if any:			



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.)

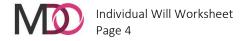
Note: We typically add a paragraph in the will stating: "I may leave among my personal papers a memorandum identifying certain items of my tangible personal property for distribution at my death to one or more persons . . . "

	Preferences	Comments
All Tangible Personal Property goes to Children in equal shares, and if Children are deceased, then to their Children	Check to Choose This Option	
All Tangible Personal Property 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 Tangible Personal Property shall be split as indicated.	Check 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:	
Other: Please indicate your own preferences for who should receive your Tangible Personal Property. Please provide details in comments section.	Check to Choose This Option	

Gifts of Specific Items of Tangible Personal Property

Please list any Tangible Personal Property that you want to go to a specific child or other beneficiary.

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

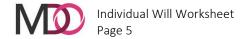


Real Property (Real Estate)

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.)

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



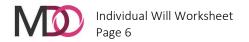
Residue

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:	Check to 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.	Check to choose this option	
Place residue in a Trust. Please provide details in the comments section.	Check to 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:



Trustee (s)

Guardian (s)

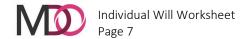
Alternate Trustee (s)

Alternate Guardian(s)

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	L st Payment	Age for 1st Payment
	Percenta	age of Total Paid in 1st	Percentage of Total Paid in 1st
	Payment	%	Payment%
	Age for 2	2 nd Payment	Age for 2 nd Payment
	Percenta	nge of Total Paid in 2 nd	
	Payment	%	Percentage of Total Paid in 2 nd
			Payment%
	Payment	Entire Remainder	
			Age for 3rd Payment
			Percentage of Total Paid in 3rd
			Payment <u>Entire Remainder</u>
What if all Trust beneficiaries (e.g receive any remaining Trust Asse	•	ldren) die before receiving	the entire Trust principal? Who should
The Trust beneficiary's es	state.		
To the Trust beneficiary's	descend	dants and if no children, re	evert back to the residue section in my will.
My Closest living heirs-at-	·law, und	ler Georgia law	
Specify list of beneficiarie	s and an	nounts or percentages to	each:
opean, not at a anomalia		. a a	
Please list who you would nomina	te for the	e following positions and th	
		Designee	Relationship to you
Personal Representative(s)a/k/a Ex	ecutor		
Alternate Personal Representative(s)		



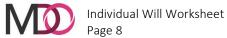
Advance Directive and Power of Attorney

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).

The **GeneralPower of Attorney** gives to another individual the broadest possible legal authority to act in your name, if you are incapacitated (for example, if you were temporarily disabled and needed someone to pay your bills in the interim). It can be drafted to be immediately effective or only in the event of your subsequent incompetence or disability.

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

DesigneeName:			
Address:			
Phone Number(s) Home:			
Email Address:			
Successor#1Name:			
Address:			
Phone Number(s) Home:			
Email Address:			
If you wish to have a GeneralPower of successor, if so desired:	fAttorney, please designate the ind	ividual you wish to act as your	agent and a
DesigneeName:			
Address:			
Phone Number(s): Home:	Work:	Cell:	
Email Address			



Vehicle (s)

Other

Business Interest

Valuable Tangible Personal Property

Inheritance Anticipated /Received

Address:		
Designate Phone Number(s) Home:	Work:	Cell:
Email Address:		
Do you wish for your Power of Attorney to b	pe (choose one):	
Effective Immediately		
Effective only upon your future in	capacity or inability to act on your	own behalf
Asset Allocation		
Please check all assets that are applicable:		
Primary Residence		
Other Real Property		
IRA (s)		
401k		
Checking Account (s)		
Savings Account (s)		
Money Market Account (s)		
Stocks/Bonds/ Mutual Funds		
Pension (s)		
Deferred Compensation		
Life Insurance		
Annuity (s)		
CD's		
Stock Options		