

WILL WORKSHEET

**EGLIN LEGAL OFFICE
96 TW/JA
501 W. VAN MATRE, BLDG 2
EGLIN AFB FL 32542
(850) 882-4611**

Scheduled Appointment (Date/Time): _____

AUTHORITY: 10 U.S.C. Sec 8037; E.O. 9397; PRINCIPAL PURPOSE: To gather information needed to prepare a last will and testament; ROUTINE USES: Use by a legal assistance attorney in preparation of a last will and testament; DISCLOSURE IS VOLUNTARY: You are not required to complete this worksheet. However, we cannot prepare a will for you if you do not. Information provided is subject to attorney-client privilege and cannot be given by an attorney to anyone without your consent.

This worksheet will help us prepare your last will and testament. Please review this worksheet and answer each question carefully. This worksheet has no legal effect and is simply a tool to help us draft your will. If you have any questions after completing the worksheet ask your attorney. If you are married, you and your spouse must each fill out separate worksheets because you each need YOUR OWN WILL. Even if one attorney advises you both, the attorney must tailor each will to conform to your individual needs.

Full Name: _____

State of Legal Residence (*we cannot draft wills for foreign countries*): _____

(Legal residence is important because the law of your legal residence will control many of the legal aspects of your will. Simply stated, your state of legal residence is the state you consider **your home**.)

Current Address: _____

Home Phone Number: _____ **Work/Cell Phone Number:** _____

Military Status: _____ Active Duty _____ Spouse of Active Duty
 _____ Retiree _____ Spouse of Retiree

Reason for Appointment: _____ Deploying _____ New Docs _____ Other (Please Explain) _____

Branch: _____ Air Force _____ Army _____ Navy _____ Coast Guard _____ Marine Corps

Marital Status: Single Married (first marriage: Yes/No) Widow(er) Divorced

Full Name of Spouse: _____

Full Name of Child	Age	Male/Female	Natural/Adopted/Stepchild	Special Needs?

Treat Adopted/Stepchildren as Natural Children? _____ Yes _____ No

BENEFICIARIES

Primary Beneficiaries: To whom do you want to leave your **residuary estate (everything left that you own)**?

Your residuary estate is everything left that you have not previously given away. It includes intangible property like stocks, bonds, mutual funds, bank accounts and any other property that, for whatever reason, did not pass as part of your other gifts. Usually, the residuary estate is also where any trusts you have would appear in your will. A trust is a legal instrument where you can give property to a "trustee" to manage for someone else (often minor children). If you choose to create a trust for minor children, you must pick the age you want the trustee to dissolve the trust and distribute the property free of trust to the children. * Note: Creating a complex trust is a complex process, beyond the scope of what our legal assistance attorneys can provide.

To my Spouse if he/she survives me, and if not, then to my children. Yes No

Asset/Address	Beneficiary	Relationship	% Share

Is there any member of your immediate family whom you wish to receive nothing under your will? Yes No

If so, what is the name of the person you wish to disinherit: _____

PROPERTY MANAGEMENT FOR MINORS

If a minor becomes the beneficiary of your estate, your personal representative or guardian will manage the property and give the remainder to that beneficiary at the age of: 18, 21, 25, other: (circle one) Note: Some states require an age greater than 18.

If you choose an age that is over 18, can the beneficiary receive *personal property* at age 18? Yes No

PERSONAL REPRESENTATIVE

Who do you want as your personal representative (or in some states "executor") to gather the assets of your estate, pay off your creditors, and distribute the remainder to your beneficiaries?

Your personal representative will be your agent for winding up your business affairs and carrying out your wishes for distribution of your property as stated in your will. This person should be capable of making important decisions on your behalf soon after your death. Therefore, you should take care to nominate a person who you are confident can think and act clearly. Many people wish to nominate their spouse as their personal representative. This may or may not be a good idea, depending on your spouse and their ability to act after your death. Most of our clients do nominate spouses or other close relatives as personal representative and these people usually serve well in that capacity. In case your nominee cannot act as your personal representative for some reason, you should nominate an alternate as well. Your personal representative must be at least 18 years of age.

Primary: _____

Relationship: _____

Alternate: _____

Relationship: _____

Alternate: _____

Relationship: _____

GUARDIANS

If your children are minors when you die, and the other natural parent is not alive or cannot act as guardian, you may appoint someone to act as legal guardian of the children. It is one of the most important things parents of minor children should do. Parents want their children raised in a loving home. If you die while your children are minors the best way you can help ensure they are raised in a loving home is to name their guardian(s). If you fail to name a guardian(s), the court will appoint one for you. However, there is no way the court could do as well as you in making this important decision. When picking guardians, you should consider the age of your children as well as the age and health of the prospective guardians. As with personal representatives, it is often prudent to select an alternate guardian or guardians in the event your first choice is unwilling or unable to perform. We recommend that you talk to prospective

guardians and get their agreement to so act before nominating them in your will. When naming the guardians, you may wish to indicate the relationship of the intended guardian to the child (i.e. aunt, uncle, etc.).

Primary: _____

Relationship: _____

Alternate: _____

Relationship: _____

POWER OF ATTORNEY FOR HEALTH CARE and LIVING WILLS

We can also provide living wills and powers of attorney for health care when we prepare your will. A living will, also known as an advance directive to physicians in some states, permits you to express your wishes regarding resuscitation and life maintaining measures in the event you later become incapable of communicating your desires. A power of attorney for health care, on the other hand, allows you to appoint another person to make decisions for you regarding your medical care in the event you cannot. This power is broader than the living will. It also covers situations where you may be terminally ill and need resuscitation or other life maintaining measures to stay alive. In addition, it also applies to situations where a health care decision is required but you cannot make that decision yourself (i.e., you are unconscious as a result of injury).

AGENT DESIGNATION

Who do you wish to designate as your agent to make health care decisions for you if you become incapacitated?

PRIMARY: Name: _____

Current Address: _____

Home Phone Number: _____ Work/Cell Phone Number: _____

ALTERNATE Name: _____

Current Address: _____

Home Phone Number: _____ Work/Cell Phone Number: _____

LIVING WILL

Do you want a Living Will (permits you to express your wishes regarding resuscitation and life maintaining measures in the event you later become incapable of communicating your desires)? Yes No

ORGAN DONATION

Is your agent authorized to donate your organs for transplants? Yes No If you answered yes, do you wish to limit your donation to transplant only rather than for any medical, educational or scientific purpose?

Yes, Limit to transplant only No, do not place limit on tissue and organ donation

Do you have a particular wish to die at home rather than in a hospital? Yes No

FUNERAL ARRANGEMENTS

Would you like to include your wishes regarding funeral arrangements in your will? Yes No

If yes, please describe (burial, cremation, full military honors, burial location, etc.): _____
