



MUNGER & MIDDLETON  
ATTORNEYS AT LAW

**BASIC WILL INFORMATION SHEET**  
(PLEASE PRINT)

**GENERAL INFORMATION**

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Spouse's Full Name: \_\_\_\_\_

Spouse's Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Home Address: \_\_\_\_\_

Telephone: (C) \_\_\_\_\_ (H) \_\_\_\_\_

Email Address: \_\_\_\_\_

Children:	Birth Date:	Age:
_____	_____/_____/_____	_____
_____	_____/_____/_____	_____
_____	_____/_____/_____	_____
_____	_____/_____/_____	_____
_____	_____/_____/_____	_____

**APPROXIMATE VALUE OF ESTATE:**

\$ \_\_\_\_\_

*Your estate includes, but is not limited to, items such as: Checking Accounts, Savings Accounts, CDs, Life Insurance, Investments, Retirement, Business Interests, Land, Buildings, Automobiles, and Personal Property. Please note, items that have beneficiary clauses electing specific people will pass outside the estate and will not be controlled by your Last Will & Testament, but their value should still be taken into account here. You should also be aware of any debts/liabilities you have accrued. Debts/Liabilities can include, but are not limited to: Mortgages, Loans, Credit Cards, Automobile Loans, etc. Your personal rep should know how to locate all of this.*

*If you are interested in further outlining your estate, Munger & Middleton offers an "Estate Planning Checklist" document that can help you do this. Just ask our front desk and we will be happy to provide it.*

**PERSONAL REPRESENTATIVE:**

*A Personal Representative owes a fiduciary duty to the Estate they represent. This person can become legally liable for mishandling an estate and should be a responsible person.*

Primary Person: \_\_\_\_\_

Alternate Person: \_\_\_\_\_

**GUARDIAN FOR MINOR CHILDREN** (if applicable)

*Responsible for Physical day-to-day care of minor children.*

*In the event that you and your spouse predecease any minor children, please provide the name of a person(s) or institution(s) that you would like to serve as Guardian for your minor child(ren).*

Primary Person(s): \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

Alternate Person(s): \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

**UNIFORM TRANSFER TO MINORS ACT** (if applicable)

*In the event that you and your spouse predecease any minor children, then you may appoint a Custodian to be responsible for their inherited property (for the benefit of the child) until they become of age. This person will not have the powers of a Guardian. They are only in charge of property. You may only appoint one person as Custodian over a minor child.*

Primary Custodian: \_\_\_\_\_

Alternate Custodian: \_\_\_\_\_

**NO FAMILIAL HEIRS** (if applicable)

*If you don't have living parents, spouse, children, grandchildren, etc. or prefer not to leave assets to any of these people. Please provide how and to whom your estate is to be left to. (please use basic percentages if possible).*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**PRIOR MARRIAGES** (if applicable)

\_\_\_\_\_  
\_\_\_\_\_

**SPECIAL REQUESTS GENERALLY**

*If you have any children or heirs who require special needs then we have other Support, Maintenance, and Education Trust provisions available. Furthermore, if you would like to have a specific Trust tailored to your desires, or if you have any other particular requests at all, please contact our office for a consultation.*

## **THINGS TO BRING TO YOUR CONSULTATION**

When you come to your consultation, please bring this form filled out. You will also need to bring the following if you have it:

- List of Real Estate you own and how title is held (can bring deed if you don't know).
- If you have any accounts with a Beneficiary Clause, please verify how that information is filled out and who you selected as beneficiary. You do not need to bring any other information with you regarding these accounts.
- If you have a Trust, please bring a copy of the Trust with you.
- If you have previous Wills or Powers of Attorney, please bring copies of these with you.
- If you will be creating Powers of Attorney, please be sure you have current addresses for each of the people you will giving said power to.