

WILL PREPARATION WORKSHEET

I. Your Estate

List the contents of your estate, including bank accounts, stock, IRAs, real estate, motor vehicles, life insurance, and anything else that you may own, whether by yourself or with another person. For this purpose, an estimate of the value is sufficient.

Bank Accounts

- 1. _____ \$ _____
- 2. _____ \$ _____
- 3. _____ \$ _____
- 4. _____ \$ _____

Stocks, Bonds, Treasury Notes, Other Investments

- 1. _____ \$ _____
- 2. _____ \$ _____
- 3. _____ \$ _____
- 4. _____ \$ _____

Life Insurance, IRAs, Pension, 401K

- 1. _____ \$ _____
- 2. _____ \$ _____
- 3. _____ \$ _____
- 4. _____ \$ _____

Real Estate

- 1. _____ \$ _____
- 2. _____ \$ _____

Tangible Personal Property

(This category includes furniture, jewelry or artwork -- anything of significant value or that you would like to go to a particular person.)

1. _____ \$ _____
2. _____ \$ _____
3. _____ \$ _____
4. _____ \$ _____

II. Beneficiaries

Here, list the people you would like to receive a part of your estate, including family members, friends, and charities.

Spouse Name _____

Children

1. _____
2. _____
3. _____
4. _____

Other Individuals

(Include friends, grandchildren, brothers and sisters, or anyone else to whom you would like to give a part of your estate.)

1. _____
2. _____
3. _____
4. _____

Charities

(List any religious or other non-profit organizations to whom you would like to make a bequest. This may reduce the taxes on your estate.)

1. _____
2. _____

3. _____

4. _____

III. Executor

Name the person or persons you would like to appoint to administer your estate. He or she -- in which case she is called the "executrix" -- will carry out your wishes as stated in your will. Two people may serve together in this role. Also name an alternate in case the first appointed cannot serve for any reason.

Executor, executrix

1. _____

2. _____

Alternate

1. _____

2. _____

IV. Guardian of Children

The most important purpose of a will for most younger people is the appointment of a guardian for their children under age 18. All people with children should have wills for this purpose.

Guardian _____

Alternate _____