

## **CLIENT DATA SHEET: LAST WILL AND TESTAMENT**

**Return to:**

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**C. Children**

**1. Child**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Spouse (if applicable)

\_\_\_\_\_  
Children of Child (if applicable) (Please list date of birth for each grandchild)

\_\_\_\_\_  
Children of Child (if applicable) (Please list date of birth for each grandchild)

Check:  Marital  Illegitimate  Prior Marriage  Adopted

Check:  Male  Female

**2. Child**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Spouse (if applicable)

\_\_\_\_\_  
Children of Child (if applicable) (Please list date of birth for each grandchild)

\_\_\_\_\_  
Children of Child (if applicable) (Please list date of birth for each grandchild)

Check:  Marital  Illegitimate  Prior Marriage  Adopted

Check:  Male  Female

### 3. Child

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Spouse (if applicable)

\_\_\_\_\_  
Children of Child (if applicable) (Please list date of birth for each grandchild)

\_\_\_\_\_  
Children of Child (if applicable) (Please list date of birth for each grandchild)

Check:  Marital  Illegitimate  Prior Marriage  Adopted

Check:  Male  Female

**D. Paternal Parents**

**1. Father**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

**2. Mother**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

**E. Maternal Parents**

**1. Father**

_____	_____	
Full Legal Name	Formally Known As/Also Known As	
_____		
Address		
_____	_____	_____
City	State	Zip
_____	_____	
Phone Number	Email	
_____	_____	
Date of Birth	Social Security Number	

**2. Mother**

_____	_____	
Full Legal Name	Formally Known As/Also Known As	
_____		
Address		
_____	_____	_____
City	State	Zip
_____	_____	
Phone Number	Email	
_____	_____	
Date of Birth	Social Security Number	

**F. Husband's Siblings**

**1. Sibling**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Spouse (if applicable)

\_\_\_\_\_  
Children of Sibling (if applicable) (Please list date of birth)

Check:  Male  Female

**2. Sibling**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Spouse (if applicable)

---

Children of Sibling (if applicable) (Please list date of birth)

Check:  Male  Female

**3. Sibling**

---

Full Legal Name

---

Formally Known As/Also Known As

---

Address

---

City

---

State

---

Zip

---

Phone Number

---

Email

---

Date of Birth

---

Social Security Number

---

Name of Spouse (if applicable)

---

Children of Sibling (if applicable) (Please list date of birth)

Check:  Male  Female

**G. Wife's Siblings**

**1. Sibling**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Spouse (if applicable)

\_\_\_\_\_  
Children of Sibling (if applicable) (Please list date of birth)

Check:  Male  Female

**2. Sibling**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Spouse (if applicable)

\_\_\_\_\_  
Children of Sibling (if applicable) (Please list date of birth)

Check:  Male  Female

**3. Sibling**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Spouse (if applicable)

\_\_\_\_\_  
Children of Sibling (if applicable) (Please list date of birth)

Check:  Male  Female

**F. Other Beneficiary of the Estate**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

**II. DESIGNATION OF GUARDIAN FOR MINOR CHILDREN**

**A. Guardian(s)**

\_\_\_\_\_  
Name of Guardian

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Name of Co-Guardian

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number(s)

**B. Alternative Guardian(s)**

\_\_\_\_\_  
Name of Alternative Guardian

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Name of Co-Alternative Guardian

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number(s)

**III. EXECUTOR**

**A. Executor(s)**

\_\_\_\_\_  
Name of Executor

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Name of Co-Executor

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number(s)

**B. Alternative Executor(s)**

\_\_\_\_\_  
Name of Alternative Executor

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Name of Co-Alternative Executor

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number(s)

**IV. PRIOR AND EXISTING WILLS**

**A. Husband**

\_\_\_\_\_

Date

\_\_\_\_\_

Location

\_\_\_\_\_

Date

\_\_\_\_\_

Location

**B. Wife**

\_\_\_\_\_

Date

\_\_\_\_\_

Location

\_\_\_\_\_

Date

\_\_\_\_\_

Location

**V. ASSETS**

**A. Real Property**

**1. Property**

\_\_\_\_\_

Name of Property

\_\_\_\_\_

Approximate Value

\_\_\_\_\_

Address

\_\_\_\_\_

City

\_\_\_\_\_

State

\_\_\_\_\_

Zip

\_\_\_\_\_

Date Purchased

\_\_\_\_\_

Name(s) on the deed

\_\_\_\_\_

Mortgagee/Lender Name

\_\_\_\_\_

Mortgagee/Lender Account No.

\_\_\_\_\_

Mortgagee/Lender Phone No.

Type of Property: Residential Business Investment Rental Property

Legal description: \_\_\_\_\_

---

## 2. Property

\_\_\_\_\_  
Name of Property

\_\_\_\_\_  
Approximate Value

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Date Purchased

\_\_\_\_\_  
Name(s) on the deed

\_\_\_\_\_  
Mortgagee/Lender Name

\_\_\_\_\_  
Mortgagee/Lender Account No.

\_\_\_\_\_  
Mortgagee/Lender Phone No.

Type of Property: Residential Business Investment Rental Property

Legal description: \_\_\_\_\_

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**B. Stocks and Bonds**

**1. Stocks**

<b>Stock Name</b>	<b>Certificate No.</b>	<b>Address</b>	<b>Title Owner</b>	<b>Stock Value</b>

**2. Brokerage Accounts**

<b>Brokerage Name</b>	<b>Account No.</b>	<b>Address</b>	<b>Title Owner</b>	<b>Account Value</b>

**3. Mutual Funds**

<b>Fund Name</b>	<b>Account No.</b>	<b>Address</b>	<b>Title Owner</b>	<b>Fund Value</b>

#### 4. Dividend Reinvestment Plans

DRIP Name	Account No.	Address	Title Owner	Fund Value

#### 5. Commodities

Commodity Name	Account No.	Address	Title Owner	Commodity Value

#### 6. Options

Option Name	Account No.	Address	Title Owner	Option Value

**7. Bonds**

Type of Bond	Bond Issuer Name	Certificate No.	Address	Title Owner	Bond Value

**C. Bank Accounts**

Type of Account (Checking, Savings, Money Market)	Bank Name	Account No.	Address	Title Owner	Individual or Joint; In Trust for; Custodian for; Payable on Death to

**D. Life Insurance**

<b>Name of Insurance Co.</b>	<b>Policy No.</b>	<b>Name of Insured</b>	<b>Owner of Policy</b>	<b>Type of Policy</b>	<b>Value</b>	<b>Primary and Contingent Beneficiaries</b>

**E. Annuities**

<b>Name of Company</b>	<b>Policy No.</b>	<b>Title Owner</b>	<b>Address</b>	<b>Face Value</b>	<b>Cash Value</b>	<b>Primary and Contingent Beneficiaries</b>

**F. Tangible Personal Property**

**1. Vehicles**

<b>Make</b>	<b>Model</b>	<b>Year</b>	<b>Vehicle Identification Number</b>	<b>Title Owner</b>

**2. Boats**

<b>Make</b>	<b>Model</b>	<b>Year</b>	<b>Vehicle Identification Number</b>	<b>Title Owner</b>

**3. Trailers and Other Titled Personal Property**

<b>Make</b>	<b>Model</b>	<b>Year</b>	<b>Vehicle Identification Number</b>	<b>Title Owner</b>

**4. Antiques/Collectibles**

<b>Description</b>	<b>Title Owner</b>	<b>Approximate Value</b>

**5. Furnishings**

<b>Description</b>	<b>Title Owner</b>	<b>Approximate Value</b>


**G. Estate, Trust and other Beneficiary Designations**

**1. Pending Estates**

<b>Decedent's Name</b>	<b>Personal Representative's Name</b>	<b>Address of Personal Representative</b>	<b>Type and Value of Asset to be Inherited</b>	<b>Court in Which Estate is Pending</b>	<b>Case No.</b>

**2. Trust Beneficiary Interests**

<b>Name of Trust</b>	<b>Name of Trustee</b>	<b>Person Who Created Trust</b>	<b>Date Created</b>	<b>State in Which Created</b>	<b>Current Value</b>

**H. Claims and Litigation**

<b>Claimant's Name</b>	<b>Assets Subject to the Claim</b>	<b>Court</b>	<b>Case No.</b>

**I. Benefits from Social Security, Medicaid, or other Government Programs or Civil or Military Service**

**1. Social Security Income**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**2. Medicare**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**3. Medicaid Benefits**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**4. Non-Retirement Civil Service Benefits**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**5. Military Retirement Benefits**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**6. Civil Service Retirement Benefits**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**7. Non-Governmental Retirement Benefits**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**J. Business Operating Transactions**

**1. Corporations**

<b>Corporation Name</b>	<b>Title Owner</b>	<b>Address</b>	<b>Shares</b>	<b>Value</b>

**2. Partnerships**

Partnership Name	Title Owner	Address	Shares	Value

### 3. Sole Proprietorships

Sole Proprietorship Name	Title Owner	Address	Shares	Value

### K. Pets

Type of Pet	Title Owner	Address	Name	Age