

FORT CAMPBELL LEGAL ASSISTANCE WILL WORKSHEET

(2 pages, see reverse side) 

PERSONAL INFORMATION

Marital status (select all that apply): <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Separated or about to divorce <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed		
Name:	Last 4 of Social:	State of legal residence:
Name of spouse if married or separated:		Sex of Spouse: <input type="checkbox"/> Male <input type="checkbox"/> Female
Status: <input type="checkbox"/> Active duty -Rank:	<input type="checkbox"/> Retired <input type="checkbox"/> Family member - active duty	<input type="checkbox"/> Family member - retiree <input type="checkbox"/> Other
Street Address:	City, State, Zip:	Phone Number:

WHO DO YOU WANT TO TAKE CARE OF YOU IF YOU ARE INCAPACITATED?

A **living will** allows you to express your desires regarding withdrawal of life support. It generally states that if you have a terminal medical condition or are left in a vegetative state then you wish to have life support withdrawn.

Do you want a **living will**? yes no

A **special power of attorney for healthcare** allows you to appoint someone to make medical decisions for you if you are unable to do so. It also gives that person access to your medical records for the purposes of making those decisions.

Do you want a **special power of attorney for healthcare**? yes no

Healthcare Attorney-in-Fact: This person is your first choice to make healthcare decisions for you.

Full name and relationship:
Street address, city and state and zip code where the individual lives:
Telephone number of named individual:

Donate your organs for transplant? (y / n) For scientific research? (y / n) Other restrictions? _____

FOR CLIENTS WITH CHILDREN

Full name of child (first, middle, last)	Age	T= <input type="checkbox"/> From this marriage P= <input type="checkbox"/> Previous marriage		A= <input type="checkbox"/> Adopted S= <input type="checkbox"/> Stepchild		Gender M/F

If adopted or step-children, should will provide they are to be treated in your will like natural born children? yes no

ASSETS

Does the estimated value of your combined assets with your spouse, if married, exceed \$500,000? yes no

Do you own any real estate? yes no

WHO DO YOU WANT TO RECEIVE YOUR PROPERTY AFTER YOUR DEATH?

Check here if you want your spouse to get everything, and if your spouse dies, then equally to your children. If you check this box ignore the grids below for Primary Beneficiary and Alternate Beneficiary. Complete the grids below only if you want to give your property to someone other than your spouse and/or children.

Primary Beneficiary or Beneficiaries

Name of person (first, middle, last)	Relationship	Percentage (must add up to 100%)

Alternate Beneficiary or Beneficiaries: receive your estate if the primary beneficiary or beneficiaries do not survive you

Name of person (first, middle, last)	Relationship	Percentage (must add up to 100%)

MISC./Specific Bequests/Disinheriting

Is there specific property or trust you want a specific person, charity, or pet to receive or is there a person that you want to disinherit? If yes, complete below:

Full name, relationship, describe action:

LEAVING PROPERTY FOR MINOR CHILDREN

If you leave money to minor children without further instructions, the money will be placed in a guardianship of the property. You can decide who will become the guardian of the money. An adult (who need not be the same person as the guardian of the person) will hold the money for the children until they reach the age of majority under state law, which is usually age 18. Money is then given to the child in one lump sum.

Instead of a guardianship of the property, the money can instead be placed in a trust. This allows you to select an age of distribution that is older than the state's age of majority, or to distribute the money in more than one installment (e.g. you can require the child to be 21 or 25 years old before the child will get the money).

Under both systems, the adult can use the money throughout your children's lives for their health, education, and other needs.

Do you want to establish a trust for your children in your will? yes no

Money in the trust is to be distributed as follows (choose one):

give it to my children in one lump sum at age 18 21 25 other _____

OR

give it to my children in installments as follows (choose one):

1/2 at 21 and 1/2 at 25 1/3 at 21; 1/3 at 25; and 1/3 at 30 1/3 at 25; 1/3 at 30; 1/3 at 35

WHO DO YOU WANT TO TAKE CARE OF YOUR PERSONAL MATTERS AFTER YOUR DEATH?

Executor (also known as Personal Representative): This person is your first choice to settle your estate.

Full name and relationship:

Alternate Executor: This person is your second choice to settle your estate, if your first choice dies or is unwilling to serve.

Full name and relationship:

WHO DO YOU WANT TO RAISE YOUR CHILDREN?

GUARDIAN OF THE PERSON: This person is your preference for who will raise your children in the event both parents die. This person is called the guardian of the person. This person does not have to be the same person who manages the child's money but it could be the same person if you elect to name the person to serve in both positions.

Primary Guardian: This person is your first choice to serve as guardian.

Full name(s) and relationship:

Alternate Guardian: This person is your second choice to serve as guardian, if your first choice dies or is unwilling to serve.

Full name(s) and relationship:

TRUSTEE: The Trustee is the person who manages the child's money while it is in the trust. The trustee should generally not be one of the older children or someone who may share in the property as this may cause conflict.

Trustee: This person is your first choice to serve as trustee.

Full name(s) and relationship:

Alternate Trustee: This person is your second choice to serve as trustee, if your first choice dies or is unwilling to serve.

Full name(s) and relationship:

BEQUESTS TO CHILDREN: Bequests to children usually should be "per stirpes" not "PER CAPITA." A "per capita" distribution cuts off the family of a child who has died (unless all the other children also have died). A "per stirpes" distribution treats living children equally, but avoids cutting off the family of a child who has died.

Do you wish to bequest to your children "per capita" rather than "per stirpes"? [Usually no] yes no

Funeral Arrangements

There is no requirement to include language in your will regarding funeral arrangements and if you do not desire to have this in your will leave this part blank, but if you wish to express your desires in the will then complete the following:

Burial or Cremation (circle one) With full military honors? yes no If specific location, list: _____