**WILL DATA FORM**

**PERSONAL HISTORY**

Name:

Address:

City, State, Zip:

Telephone: Home:

 Cell:

Email:

Date of Birth:

Social Security Number:

Citizenship:

Organ Donor Information:

Spouse Name:

Spouse Address:

 Social Security #:

Children names and ages: 1.       Age:

 Social Security #:

1. Age:

 Social Security #:

 3.       Age:

 Social Security #:

 4.       Age:

 Social Security#:

Beneficiaries to estate:

**ADMINSITRATION OF ESTATE**

Executor       Phone:

 Address:

Alternate Executor       Phone:

 Address:

Trustee       Phone:

 Address:

Alternate Trustee       Phone:

 Address:

Guardian of Person       Phone:

(for minor children)

 Address:

Alternate Guardian       Phone:

 Address:

Guardian of Estate       Phone:

 Address:

Alternate Guardian       Phone:

 Address:

Power of Attorney       Phone:

 Address:

In case trustee is appointed, trust is to terminate when the

youngest child reaches age   .

**WILL DATA CHECKLIST**

1. Date and place of marriage; if divorced or separated, provide details [ ]
2. Pre or post-marital agreements [ ]
3. Current Wills or codicil [ ]
4. Living trust agreements (revocable and irrevocable) [ ]
5. Addresses of persons to be your personal representative,

guardian, or trustee. [ ]

 6. Employment information [ ]

 7. Income tax returns for last three years [ ]

 8. Gift Tax returns [ ]

 9. Life insurance policies [ ]

 10. Information on pensions, profit sharing, and deferred compensation plans [ ]

1. Business agreements related to corporations, partnerships,

and sole proprietorship interests [ ]

1. Listing of all real estate including type of ownership, present

fair market value, and mortgages [ ]

 13. Listing of personal property including ownership, location, and value [ ]  (with photos)

 14. Outline of objectives and disposition of your estate [ ]

1. Legal names and addresses of charitable organizations you wish

to benefit with amount of contributions. [ ]

**CONTINUE TO “SUCCESSION PLANNING FOR YOUR BUSINESS”**

***We have all heard of succession planning and we have just left it somewhere down on our priority list. Preparing a succession plan is a critical issue that is long overdue. It is not only important it is urgent.***

***You are not only responsible for your wife and family, but all the assets God has give you, including your business.***

***Life is not a dress rehearsal. When you die that’s it. Tomorrow is too late.***

***Procrastination is the greatest threat for your family, employees, clients, vendors, and others.***

***It is imperative that you start the process today, not tomorrow, but…today.***

***If you don’t, you are mismanaging the major asset God has entrusted to your card.***