**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.***