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Will and Testament Engagement Form

1. Correct Legal Name of Client Date of Birth Date of Marriage

H) _____

W) _____

2. Prior Marriages To whom Date How Children of That Marriage
Spouse Married Terminated Terminated and Their Ages

3. Legal Residence
Street Address

Telephone _____ County _____

4. Children No Children

Legal Names(in equal shares)	Gender	Birthdate	Comment
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

5. Reason(s) why children should be treated differently, and if so why:

6. If husband and wife die before children reach maturity, successor guardians:

Name	Address	Age	Relationship
_____	_____ _____ _____	_____ _____	_____
_____	_____ _____ _____	_____ _____	_____
_____	_____ _____ _____	_____ _____	_____

7. If husband and wife die before children reach maturity, trustees:

Name	Address	Age	Relationship
_____	_____ _____ _____	_____ _____	_____
_____	_____ _____ _____	_____ _____	_____
_____	_____ _____ _____	_____ _____	_____

8. If husband and wife die, at what age or ages do children receive money:

Percentage	Age(s)
_____ _____ _____	_____ _____ _____

9. Executor:

Name	Address	Relationship
H) _____	_____ _____ _____	_____

W) _____

10. Successor Executor:

Name	Address	Relationship
H) _____	_____ _____ _____	_____
W) _____	_____ _____ _____	_____

11. Agent for Power of Attorney's

Name	Address	Relationship
H) _____	_____ _____ _____	_____
W) _____	_____ _____ _____	_____

12. Special Provisions:

13. Trustee:

Name	Address	Relationship
H) _____	_____ _____ _____	_____

W) _____

14. Successor Trustees:

Name	Address	Relationship
H) _____	_____ _____ _____	_____

W) _____	_____ _____ _____	_____
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15. Residuary of estate to _____; if (s)he deceased, residuary to _____ (in trust?) _____; if deceased, then residuary to be distributed as follows:

Name	Address	Relationship
a. _____	_____ _____ _____	_____
b. _____	_____ _____ _____	_____
c. _____	_____ _____ _____	_____
