



Will Worksheet

With Worksheets for Living Wills and POA's

Name: _____

Phone Number: _____

Email: _____

INTRODUCTION

The process of getting or updating your will is a simple four-step process. First, complete this worksheet as completely as possible. If you have questions, note them in the margins to discuss with an attorney.

Second, make an appointment to speak with an attorney at the Northern Law Center-SHAPE. The appointment gives you a chance to help the attorney understand your situation and wishes. If you currently have a will, please bring a copy with you to the appointment.

Third, following your appointment, the attorney will draft your will along with a living will, medical power of attorney, or other power of attorney that you would like. Once these are complete, you will be notified. Please take time to review these documents for accuracy.

Fourth, once you are satisfied with the final draft, you may schedule an appointment to execute your will and other documents.

The Northern Law Center-SHAPE is located in building 318 on SHAPE, Belgium. To call or make an appointment, please call DSN: 423-4868 or Comm. 065/44.48.68.

WILL TERMINOLOGY

WHAT IS A WILL? A will is a legally effective declaration of a person's wishes as to the disposition of his/her property upon his/her death. It must be executed with the formalities required by statute. The provisions of a wills do not take effect until after the death of the maker. A will never disposes of the proceeds of insurance policies with named beneficiaries, nor does it dispose of some items of property which are held under various forms of special ownership, such as joint tenancy with a right of survivorship, or tenancy by entirety. In a will, you will designate an executor/trix, and if

minor children are involved, a guardian (see definitions below). It is important that you contact the prospective executor/trix and guardian prior to the preparation and execution of the will to ensure that he/she/they is/are willing to accept the position.

WHO IS THE BENEFICIARY? Anyone to whom the maker of a will (testator/trix) leaves a portion of his/her property.

WHAT DOES BEQUEATH MEAN IN A WILL? To give personal property by will.

WHAT IS A BOND? Money put up by a guardian or executor to insure against loss occasioned by their negligence or theft.

WHAT IS AN ESTATE? All property, real and personal, in which a person has an interest, such as money, savings accounts, stocks, house, furniture, insurance policies, etc.

WHAT DOES RESIDUARY ESTATE MEAN? It means what is left over. Your residuary estate is the portion of your estate that is not specifically disposed of in your will.

WHAT DOES EXECUTION MEAN? The formal and legal process for witnessing, and signing, and validating a will.

WHO IS THE EXECUTOR/TRIX? Often also referred to as the personal representative, it is the person named in a will to carry out the wishes expressed in the will. Upon the death of a maker of a will, the Executor/trix must take the will to the proper court for probate. Once the court accepts the will as valid, the court officially appoints the person as Executor/trix. Individuals serving in this capacity serve subject to court approval. A bond may be required of an Executor/trix.

WHO IS A GUARDIAN? One who is responsible for caring for the person and/or property of a minor child. Individuals serving in this capacity serve subject to court approval.

WHO IS THE TESTATOR/TRIX? The person making the will. A Testator is male; a Testatrix is female.

WHAT IS PERSONAL AND TANGIBLE PROPERTY? Property which is moveable.

WHAT IS A PROBATE? A court proceeding where the Executor/trix establishes a will as genuine, settles all the debts of an estate, and distributes the property in the estate to the heirs according to the wishes of the will maker as expressed in the will.

WHAT IS A PROBATE ESTATE? The portion of an estate that requires court supervised administration to effect transfer of title. It does not include property transferred at the time of a person's death by other means, such as property held as joint tenants with right of survivorship, or life insurance paid to a designated beneficiary.

WHAT IS REAL PROPERTY? Property that has a fixed location, such as land or a house.

WILL QUESTIONNAIRE WORKSHEET

1.) **PERSONAL INFORMATION:**

- a.) Name (first, middle, last): _____
- b.) Social Security Number: _____
- c.) Are you a U.S. citizen? ____ yes ____ no
- d.) State of legal residence: _____
- e.) Current address: _____

- f.) Home telephone: _____ Work telephone: _____

2.) **MARITAL STATUS:**

- a.) ____ Married once, and my spouse is alive.
____ Presently married, and had a prior marriage (previous spouse is deceased or divorced).
____ Widow/ widower
____ Divorced, not presently married.
____ Single, never married.
- b.) Name of Spouse: _____
- c.) Is your spouse a U.S. citizen? ____yes ____no

NOTE: If both you and your spouse will be seeing the same attorney for your wills, you will both need to read and complete Appendix B.

3.) **CHILDREN:**

- a.) How many children do you have (including adopted & stepchildren)? _____
- b.) If you have adopted children or stepchildren, do you wish to treat them as natural children?
____ yes ____ no
- c.) Is any child a minor? _____
- d.) Please list your children's names, ages, and whether they are your biological, adopted, or stepchildren: _____

4.) **VALUE OF ESTATE:**

To determine what type of will is appropriate for you, please provide a rough estimate of the value of your estate. For this purpose, include the value of all of the property you own in your name, and if married, the value of your spouse's property. If any of your property secures a debt (for example, a mortgage on your home), include your equity in the property. Also include the value of your life insurance policies (SGLI, VGLI, etc.).

Approximate values of your estate (not including life insurance): \$ _____

Approximate value of your spouse's estate (not including life insurance): \$ _____

Value of life insurance (self and spouse): \$ _____

Total value of both your and your spouse's estate including life insurance: *\$ _____

* Estates with a value of more than \$2 million will be subject to federal estate taxes. Please talk to your legal assistance attorney about potential tax consequences. You may need to consult with a civilian attorney for estate planning advice to prepare your will properly.

5.) **PRIMARY BENEFICIARIES:**

a.) Whom do you want to receive all (or the majority) of your estate? The person(s) listed will also be the beneficiaries of your residuary estate.

_____ My spouse, if he/she survives me, and if not, then my children.

_____ Disinherit spouse (to the fullest extent permitted by law).

_____ My children.

_____ My parents in equal shares, or if not, then my siblings in equal shares (please provide names and relationships): _____

_____ To the following beneficiaries (list name, relationship, and percentage of estate to each of the beneficiaries): _____

b.) If any of the above beneficiaries predecease you and leave issue (e.g., children), do you want the share of the deceased beneficiary to pass to their issue, or to pass only to the beneficiaries you have indicated above?

_____ To the children of any deceased beneficiary.

_____ Only to the beneficiaries listed above.

c.) If you have more than one beneficiary, are they:

_____ Specific people who are to share equally.

_____ A group of people described as a class (e.g., "my brothers and sisters") who are to share equally.

_____ Some other unequal division between the beneficiaries (e.g., 50% to one beneficiary and 25% each to two others).

_____ Some other arrangement (please explain): _____

d.) If any of your beneficiaries is a minor, at what age do you want them to receive their gift?

_____ 18

_____ 21

_____ Some other age (please indicate the age): _____ (NOTE: Selecting an age greater than 21 will likely require the creation of a trust, which will cause your estate to incur additional expenses for the administration of the trust. These expenses would therefore diminish the amount available for your beneficiaries.)

6.) **SECONDARY BENEFICIARIES:**

If all of the primary beneficiaries you designated in Item 5 predecease you or die within 30 days of you, to whom do you wish to leave your estate (please provide name, relationship, and percentage of inheritance or list of which item(s) are to go to which individuals)?

7.) **FAMILY FARM / FAMILY-OWNED BUSINESS:**

Do you own an interest in any farm or family-owned business? _____ yes _____ no

8.) **REAL ESTATE:**

a.) Do you own real estate? _____ yes _____ no

b.) If yes, how is this property owned? _____ jointly _____ in own name _____ other

c.) How do you wish to give your real estate?

_____ To my Primary Beneficiaries or with the rest of my estate.

_____ My home to my spouse and the rest of my real estate to pass with the rest of my estate.

_____ My home to my spouse for as long as my spouse lives there and then my home and the rest of my real estate to pass with the rest of my estate.

_____ Different properties to different beneficiaries (below, please list each person, their relationship to you, and which piece of property they are to receive):

9.) **SPECIFIC BEQUESTS:**

You may elect to make specific gifts of cash, real estate, or personal property to specific people or charities in you will. However, these bequests will be distributed first and may deplete your estate. Also, specific bequests may complicate the probate of your estate if the property given cannot be found at your death. Therefore, if you make any specific bequests, you should only give property or amounts of cash that you are reasonably sure you will possess at the time of your death. If you make no specific bequests, all of your property will pass to your primary beneficiaries.

Many states also allow you to make a “personal memorandum,” in which you can give specific items of personal property to named beneficiaries in a separate writing. While in most states memorandum gifts are not legally binding, your executor will give these gifts as much weight as state law allows.

a.) Do you wish to make any specific bequest in your will? _____ yes _____ no

b.) If yes, please list your specific bequest(s): _____

10.) **PERSONAL EFFECTS AND TANGIBLE PERSONAL PROPERTY:**

How do you wish to give your personal property?

_____ All to my Primary Beneficiaries or with the rest of my estate.

_____ Specific items are to go to specific individuals, with all items not listed passing to my Primary Beneficiaries. (Attach detailed list of items, beneficiaries, and relationship to you.)

_____ Some other scenario not provided here (please explain): _____

11.) **EXECUTOR:**

The executor (or in some states, “personal representative”) is the person who makes sure your estate is settled upon your death. This ordinarily involves going through probate, which is a court-administered procedure for settling an estate. Probate involves petitioning a court for letters of appointment, settling creditor claims, finding and distributing assets, and filing any necessary tax returns.

Any adult may serve as your executor, although many states have a preference for or require an executor who is a legal resident of the state where probate is conducted. Therefore, if possible, you should select family members or responsible friends who are residents of the same state you claim as your legal residence or the state where you own real estate. Additionally, if your primary beneficiary could qualify as your executor, you should consider appointing him or her as your first choice.

a.) Whom do you wish to have as your executor?

_____ My spouse.

_____ My spouse and a co-executor.*

_____ My spouse and a successor executor.**

_____ One executor other than my spouse.

_____ Two co-executors, neither of whom are my spouse.*

_____ One executor and a successor executor, neither of whom are my spouse.**

*This option is not usually recommended because conflicts can arise between the executors that will complicate the administration of your estate.

**The successor will act only if your first choice is unable to act as your executor.

b.) Whom do you wish to have named as your executor? (Please list name and relationship):

1st choice: _____

2nd choice (optional): _____

3rd choice (optional): _____

12.) **GUARDIAN:**

If your children are minors at the time of your death and if the other natural parent of the children is not alive or for any reason cannot act as guardian, the court will normally appoint the person(s) you name below to act as legal guardian(s) of the children. The individual(s) named below will have physical control and custody of the children until they reach age 18.

If you are divorced, keep in mind the court will ordinarily appoint your former spouse to be the guardian (as the children's other natural parent), notwithstanding your direction here. You should still select a guardian, however, in case your former spouse predeceases you or for any reason cannot act as the children's guardian.

a.) Do you wish to appoint:

- One guardian for any child when I die.
- One guardian and a successor guardian.
- Two co-guardians
- No guardian is to be appointed under this will.

b.) If you wish to appoint a guardian or guardians, whom do you wish to have named? (Please list name and relationship):

1st choice: _____

2nd choice (optional): _____

3rd choice (optional): _____

13.) **TRUSTS (OPTIONAL):**

Instead of giving your estate directly to a beneficiary, you may elect to give your estate to a person designated as a trustee, to hold IN TRUST, for the benefit of your beneficiary/ies until he/she/they reach(es) the age you designate. The trustee will manage the trust under court supervision. Although the trustee's primary purpose is to safeguard the inheritance, the money can also be used for any beneficiary's health, education, welfare, or maintenance, at the trustee's discretion. Also, you may create a trust that "pools" your estate. Through pooling, your estate and insurance proceeds remain in a single trust until **all** the beneficiaries reach the age you choose. The trustee may provide funds from the trust to each beneficiary as each has a need. Thus, not all beneficiaries will receive equal amounts from the trust. Such an arrangement is useful where some beneficiaries will likely need more financial assistance over a longer period of time than other beneficiaries will. A trust is also advantageous where there is a need to protect the assets of your estate from third parties who may have claims to the assets of one of your beneficiaries.

For many people, a trust is unnecessary because, under the Uniform Gifts to Minors Act (UGMA) language that we include in your will, gifts to beneficiaries under the age of 18 (or, if you prefer, under the age of 21) will be controlled by your executor/trix initially, and guardian after probate, without establishing a trust. The executor/trix and/or guardian can still use the child's inheritance for the benefit of the child, and this arrangement is ordinarily less complicated and less expensive than establishing a trust. Therefore, unless you have children from a prior marriage, handicapped children, or a very large estate, a trust is generally not necessary to manage a child's inheritance.

One disadvantage, however, to the UGMA is it does not allow "pooling" of your estate. Put simply, under the UGMA your estate will be divided in as many equal shares as there are minor beneficiaries designated; each beneficiary will receive the remainder of his or her share as they turn 18 or 21, at your option. In a nutshell, a trust may be more appropriate if you want the trustee/guardian authority to spend more money on one child than another (e.g., a disabled child).

a.) Do you want a trust? yes no (If "no," skip to Item 14.)

If yes, would this be:

_____ one trust for the benefit of all beneficiaries.

_____ individual trusts for each of the beneficiaries.

b.) At what age would you like the trust(s) to terminate?

_____ 18 _____ 21 _____ other (please designate the age): _____

c.) Whom do you wish to have named as Trustee? (Please list name and relationship):

1st choice: _____

2nd choice (optional): _____

3rd choice (optional): _____

d.) Do you want the trustee to have the power to dissolve the trust if it becomes uneconomical to maintain it? _____ yes _____ no

e.) Do you want the trustee to exercise this power only if the trust is below a specific amount?

_____ yes _____ no

If so, what amount? \$ _____

14.) **DISINHERITING SOMEONE:**

a.) Do you wish to disinherit someone other than your spouse? _____ yes _____ no

If so, whom (please provide the name and relationship to you.)? _____

b.) Do you wish to disinherit anyone who contests your will? _____ yes _____ no

c.) If you wish to disinherit your spouse, do you want your executor to have the authority to distribute your property, outright or in trust, to minimize any right of election your spouse might have under the laws of any jurisdiction? _____ yes _____ no

15.) **DISTRIBUTION OF ESTATE TO CHILDREN:**

a.) With regard to minors who may inherit under your will, do you want their gifts to be:

_____ Paid at the election of the executor (the executor may pay the child some or all of the gift, at various times, as the executor sees fit, even though the child is a minor).

_____ Held in trust until the child is no longer a minor.

b.) If you were to have stepchildren or adopted children, would you want to:

_____ Expressly include them in your will (treat them the same as natural children).

_____ Expressly exclude them from your will.

_____ Have the will remain silent as to stepchildren and adopted children.

c.) Is any child of yours in fact a stepchild or adopted child? _____ yes _____ no

16.) **MILITARY STATUS:**

I am: _____ Active duty military.

_____ Retired from the military.

- Married to someone on active duty.
- Married to a military retiree.
- A dependent of someone on active duty
- A dependent of a military retiree
- Other (please specify): _____

If you are on active duty or are the spouse or dependent of an active duty military member, where are you, your spouse, or your sponsor stationed? _____

17.) FUNERAL ARRANGEMENTS:

You may express your desires regarding the disposition of your remains (e.g. cremation, military honors, or burial at a certain location or gravesite). However, if you elect to state your desires in your will, do not rely on your will alone to communicate those desires, as wills may not be read prior to the funeral. Finding out after the fact that the arrangements were contrary to your will may cause some dismay for your survivors. Therefore, it is recommended that you communicate your desires to your next of kin at your earliest opportunity.

You may also leave a separate writing with your will, typically called a “letter of instruction,” in which you give specific directions to your Executor/trix about funeral and burial arrangements, notifications to family and friends, upbringing of your children, etc.

At the time of death, I prefer:

- I do not wish to express my desires concerning my remains in my will and leave this decision to those who survive me.
- To be cremated.
- To have my body given for medical or scientific purposes.
- To be buried at a specified gravesite or location. (Please specify location): _____

- To be buried at sea.
- To be buried with full military honors. (You may select this option in addition to one of the above.)
- Other: _____

APPENDIX A

ANCILLARY DOCUMENTS

1.) LIVING WILLS:

A living will is not part of your will at all! But this is a good time to consider whether you want a living will, which is more accurately called an advance medical directive or declaration. This document states that in the event you have a terminal, incurable medical condition and your life is only being prolonged by means of artificially provided life support, and if you cannot communicate your desires at that point, the living will “speaks for you” so your doctors know and can act upon, your desires regarding the termination of life support.

The conditions that trigger the living will, and the extent of the medical care to be withdrawn, vary from state to state. Therefore, you should carefully review the language of the living will for the state you have chosen and decide if it truly reflects your choice for discontinuing life support. Once executed, the document is effective until it is revoked, which you may do at any time by physically destroying the document, or in an emergency, by verbally revoking it before witnesses who can testify that you did in fact revoke it.

a.) Do you want a living will? _____ yes _____ no

b.) The living will is ordinarily drafted in accordance with the laws of the state where you are currently living, because the laws of the state where you are hospitalized control the effectiveness of the living will.

Which state’s laws do you want to govern your living will? _____

2.) SPECIAL POWER OF ATTORNEY FOR MEDICAL CARE:

Another important health care document is the special power of attorney for medical care. You may execute this document in addition to, or in lieu of the living will.

This document appoints someone to make medical care decisions for you in the event that you cannot make your own medical decisions. It applies to more situations than the living will, which addresses only the issue of continued life support if you have a terminal condition. The power of attorney for medical care gives the person you designate as your agent the authority to make a wide range of medical decisions on your behalf. It also gives your agent access to your medical information and authority to fully participate with your treating physicians in deciding the care to be provided to you. Obviously, the person you designate to be your agent should be someone you trust with life and death decisions. Like the living will, the power of attorney is usually drafted in accordance with the laws of the state where you are residing.

a.) Do you want a Medical Power of Attorney? _____ yes _____ no

b.) Do you want your spouse to act as your agent? _____ yes _____ no

Unless you have selected your spouse to act as your agent **and** your spouse has the same address you do, please provide the name, address, phone number, and relationship of your first choice of agent: _____

c.) If you have a second choice, do you want

both agents to have the authority to act separately.

to require both agents to act jointly unless one is incapacitated.

the second agent to be as a successor, acting only if the first choice is incapacitated.

Please provide the name, address, phone number, and relationship of your second choice of agent: _____

d.) Do you wish to specify that you desire to donate your body organs for transplant upon death? yes no

If yes, are you also willing to donate organs and tissue for medical, educational, or scientific purposes? yes no

e.) Do you wish to specify that, if possible and if it does not place an undue burden upon your family, that you prefer to die at home rather than in a hospital? yes no

If you currently live in a state other than the one in which you are a legal resident, you may want your living will to be drafted in accordance with the laws of the state where you actually live and not your state of legal residence, because it is more likely to be used where you currently live.

f.) Do you wish to have the living will governed by the laws of the state where you currently live? yes no We will ask you more about this below.

3.) **SPRINGING DURABLE GENERAL POWER OF ATTORNEY:**

Your will enables you to dispose of your property as you wish after your death. While you are living, you have the right to decide what happens to that property so long as you are of sound mind. But if you ever become incapacitated, whether through illness or accident, and are unable to handle your own affairs, a court order may revoke your right to manage your own money and appoint a guardian or conservator. To protect yourself from this eventuality, you can appoint an agent for yourself through a power of attorney.

A power of attorney is simply a written authorization for someone to act on your behalf, for whatever purpose you designate in writing. Ordinarily, a power of attorney expires if you become mentally disabled – the time when you need help the most. A **springing, durable** power of attorney can take effect when you **become** unable to manage your own personal and financial affairs and will last as long as you are alive or until you revoke it. As long as you are mentally competent, you can revoke a durable power of attorney whenever you like simply by destroying the document.

If you choose to have a springing durable general power of attorney, remember to name someone who you trust as your attorney-in-fact. Your attorney-in-fact will have great authority over your affairs. Not only can they keep your affairs in order, but they have the potential to abuse this document at your expense and his or her gain.

- a.) Would you like a springing durable general power of attorney? _____ yes _____ no
- b.) Do you want your spouse to act as your agent? _____ yes _____ no

Unless you have selected your spouse to act as your agent **and** your spouse has the same address you do, please provide the name, address and relationship of your first choice of agent:

c.) If you have a second choice, do you want:

- _____ both agents to have the authority to act separately.
- _____ to require both agents to act jointly unless one is incapacitated.
- _____ the second agent to be as a successor, acting only if the first choice is incapacitated.

Please provide the name, address, and relationship of your second choice of agent:

d.) If you selected your spouse to act as your agent, at what telephone number can her or she be reached?

PRIVACY ACT STATEMENT

AUTHORITY: 10 USC 8013, F110 AFJAA, and EO 9397

PURPOSE: Used by attorney and client within attorney-client relationship to assist in providing a will and other related legal documents.

ROUTINE USES: Information will be used to aid attorneys and paralegals in drafting wills, living wills, and durable health care powers of attorney. Disclosure is voluntary, but if you do not provide the requested information, this office will be unable to prepare a will or other related documents for you.

APPENDIX B

DUAL REPRESENTATION REQUEST/WAIVER OF CONFIDENTIALITY

You have asked the Legal Assistance Office of the Northern Law Center-SHAPE to perform estate planning services for you and your spouse. This may include advice and preparation of a will and/or other estate planning documents. Because this legal office would be representing both spouses, the rules of professional responsibility for attorneys require that we tell both of you that a potential conflict of interest might arise that could prevent us from providing advice and services for both of you in your estate planning. It is in your interest, and our ethical obligation to each of you, that you fully understand the considerations involved in such “dual representation”. Matters to which such representation will most likely extend include the following:

1. Analysis of your wills, codicils, trusts, and property agreements, if any.
2. Analysis of the assets owned by each of you, including consideration of their value and the nature in which title is or should be held, and the categorization of such assets as separate or community property.
3. Discussions about the manner in which you wish to dispose of such property.
4. Analysis of the tax impact of such disposition and recommendations relative thereto.
5. Preparation of the documents necessary to accomplish the desired disposition. Spouses can have differing, and sometimes conflicting interests and objectives regarding the disposition of their property upon their death. This is a common problem if either spouse has children from another relationship.

Although joint representation may have the advantage of convenience, efficiency, and even reduced legal expense were you to pay for these services, joint representation also has the following disadvantages that you must acknowledge and accept as a condition to use the free services of the Legal Assistance Office:

1. Joint representation may result in less vigorous assertion or protection of one person’s individual or separate interests than if we represented only that person.
2. Joint representation has further disadvantage that no attorney-client privilege would apply to communications between you or with the Legal Assistance Attorney in any dispute between you. In other words, the attorney cannot keep confidential from one of you any communication with the other of you in the course of the joint representation, and the attorney would be compelled to testify concerning any such communication. Also any possession of confidential information from any other representation of one of you may work to the other’s disadvantage.
3. When the attorney communicates with you concerning matters of potential conflict or the pros and cons of any particular item, the attorney may rely on communication with only one of you. For this reason and possibly others, joint representation may have the disadvantage of communication that is less complete or effective than if the attorney only represented one person.
4. You should not assume that the attorney will advise each of you of the substance of every communication received by the attorney from the other of you. If you each had a separate lawyer, you would each have “advocate” for your position and would receive totally independent

advice. Information given to your own lawyer is confidential and cannot be obtained by your spouse without your consent.

That is not the case when one law office advises both of you. The Legal Assistance Attorney cannot be an advocate for one of you against the other. Information that either of you provides that relates to your estate planning and will preparation cannot be promised confidentiality. If a conflict arises which is of such a nature that we cannot adequately carry out our obligations to both of you, we will withdraw our representation, and will advise you to obtain separate and independent civilian attorneys.

After considering these factors, each of you must decide whether you wish us to represent you jointly in connection with your estate planning and related matters. If you do, please sign the acknowledgment below. If you have any questions regarding these issues, please discuss them with the Legal Assistance Attorney and do not sign this acknowledgment.

ACKNOWLEDGMENT

Each of us has read and understands the information regarding dual representation as it affects our mutual and respective estate plans. We realize the potential for conflicts of interest and differences of opinion between us and that each of us has the rights expressed above. We know that each of us has the right at any time to hire an independent lawyer or to seek legal assistance at another military legal assistance office in connection with these matters. We have discussed and evaluated the problems, and each of us requests that the Legal Assistance Office represents both of us in connection with our estate planning and related matters. Each of us consents to the dual representation. Each of us also knows and agrees that any communication and information the Legal Assistance Office receives from either of us relating to those matters may be shared with the other.

Date: _____

Date: _____

Signature: Husband

Signature: Wife

Printed Name

Printed Name