

WILL PREPARATION WORKSHEET
Weitz Law Firm, PLLC

Will Preparation Questionnaire

* upon completion, please return to scottweitz@weitzlawfirm.com, and we will contact to arrange an initial meeting.

I. Personal Information.

Your Full Legal Name: _____

Date of Birth _____

Current Address: _____

County: _____

Phone Number (____) _____

E-mail Address _____

II. Marital Status. (please check one)

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

Other relationship

If applicable, please list full legal name of spouse or partner _____

Is your spouses' address the same as your address above: Y / N

Is your spouse a U.S. Citizen? Y / N

III. Children.

Do you have any children? Y / N

- a. If No, Please skip to Section V below.

If applicable, please list your children’s name(s), date(s) of birth, and whether they are biological or adopted:

Name	DOB	Biological/ Adopted

Are you or your spouse currently pregnant? Y / N

Is any child a ‘Minor’ (under the age of 18)? Y / N

- a. If yes, is the other parent of the minor child(ren) alive? Y / N

- b. Is the parent of my child(ren) currently my spouse? Y / N

- a. If no, please name the parent here: _____

IV. Personal Guardian for Children:

If your children are minors (under age 18) when you die, and if the other natural / adopted parent is not alive or for any reason cannot act as guardian, the court may appoint the person(s) you name to act as legal guardian(s) of your minor children. The individual(s) named will have physical control and custody of children until they reach 18. If you have sole custody, upon your death, the child’s other natural or adopted parent will presumptively act as parent even if you provide for someone else to serve as a guardian in your Will. You should still name a guardian, however, in case the child’s other natural or adopted parent dies before you, is unwilling to act as parent, cannot be located or for any reason cannot act as guardian.

If you wish to name a guardian for your child(ren), please name them here:

Name and Address

Successor Guardian for Children: (if the person above is unable or unwilling to act as personal guardian, this person will act as guardian for your children.

Name and Address

V. Specific Bequests.

A specific bequest distributes a specific assets or amount of money to a specific person or organization.

Note that specific bequests will not be valid if the property given cannot be found at your death. If you make no specific bequests, all property will pass to your residuary beneficiaries. (see section VI below).

Do you wish to make any specific bequests in your Will? Y / N

- a. If Yes, a ‘Supplement to Last Will & Testament’ will be included in your will for you to fill out.

VI. Residuary Beneficiary.

Your ‘residuary estate’ consists of all property remaining after paying all debts and expenses of administration, and giving out all specific bequests (see section V above). Since many people choose not to make specific bequests, the ‘residuary’ typically describes all the property left to your primary beneficiaries. (please choose a residuary beneficiary below).

___ My Spouse. If my spouse is not living upon my death, the item(s) shall be distributed to my issue per stripes. “Issue per stirpes” means that your bequest will follow each child’s bloodline.

___ My Spouse. If my spouse in not living upon my death, the item(s) shall be distributed to my children then living.

___ My Spouse. If my spouse is not living upon my death, the item(s) shall be distributed to another individual. Please name individual(s): _____

___ My children then living. If I have no living children, the item(s) shall distributed to my then living grandchildren.

___ My issue, per stripes. (“Issue per stirpes” means that your bequest will follow each particular child’s bloodline. Ie. If a child predeceases you, their children would receive your child’s share)

___ Other Named Individual(s). Note: If named individuals are not living upon my death, the item(s) shall be distributed to another named individual or individual(s).

Please name the individual(s): _____

Please name the alternative individual(s): _____

VII. Stepchildren.

Do you have step-children? If no, please skip to section IX below.

Step-children are not considered ‘children’ for the purposes of estate distribution under the state laws of Washington. If you check yes, we will provide a provision in your will to provide for step-children regardless of whether you are married to the step-child’s parent or not at your death. If you check no, the stepchildren paragraph will not be included.

If you have stepchildren, please list them below:

Name	Date of Birth

___ Yes, I would like to treat my step-children as biological or adopted children for the purposes of my will.

___ No, I would not like to treat my step-children as biological or adopted children for the purposes of my will.

VIII. Cost of Distributing the Estate.

It helps to know whether you want the estate to pay any shipping costs to send the tangible personal property to a beneficiary or whether the beneficiary must come up with the money to receive tangible personal property.

The cost of distribution the property in your estate:

___ should be paid as an expense of administering my estate.

___ should be paid by the person, charity or organization receiving the item(s)

IX. Personal Representative.

Your Personal Representative (often called “executor”) insures that your estate is settled upon your death. This ordinarily involves going through ‘Probate’, a court administered procedure for settling an estate as provided in your Will pursuant to Washington State law. Probate involves petitioning a court for letters of appointment, settling creditor’s claims, finding and distributing assets, and filing any necessary tax returns. **Any competent adult** may serve as your Personal Representative.

Do wish to appoint as your Personal Representative?

___ My spouse/ partner

___ Another individual. Please name: _____

Do you wish to have a **co-Personal Representative**? Y / N . *This option is NOT usually recommended because conflicts can arise between representatives which may complicate and prolong the distribution of your estate.*

If yes, please name your desired co-Personal Representative: _____

Do you wish to have a **successor Personal Representative** should your appointed Personal Representative be unable or unwilling to act? Y / N

If yes, please name your desire Successor Personal Representative:

X. Bond Requirement.

Unless you elect to waive bond, the State of Washington will require your Personal Representative to file a credit application with a bond agency. If the personal representative were to steal assets from the estate, the bond would replace what was stolen in the amount of the bond. Depending on the size of the estate, bonds can be very expensive. People often waive the bond requirements for the following reasons:

- 1) The person trusts the Personal Representative as a fiduciary whom they trust in the role.
- 2) The person does not want the estate to pay the expense of the bond

People that do require a bond do so as a security measure if there are multiple beneficiaries, the person does not know the Personal Representative very well or the person does not trust the personal representative.

___ Bond **IS NOT** required of my Personal representative of my estate

___ Bond **IS** required of Personal Representative of my estate.

XI. Power of Attorney

Another important part of your estate plan is to appoint a Power of Attorney for your financial and health care needs should you become incapable of making these decisions on your own.

Please appoint an ‘Agent’ to make **financial decisions** should you become incapable of making such decisions:

Name Address Phone Number

Alternate Agent: _____

Please appoint an ‘Agent’ to make **health care decisions** should you become incapable of making such decisions:

Name Address Phone Number

Alternate Agent: _____

XII. Miscellaneous Requests.

A. Do you have any children or relatives that you wish to **DISINHERIT**? Y / N
If yes, please list them here and give a brief reason for the disinheritance:

B. Do you wish to include **FUNERAL ARRANGEMENTS** in your will? Y / N

C. Do you wish to donate any **BODY PARTS** or **BODY**? Y / N
a. If yes, Organ Donor form will be provided

D. Do you have any **PETS** that you would like to appoint a caretaker for? Y / N
a. If yes please name pet and desired care-taker here
Pet(s): _____
Caretaker: _____

E. Are there any **DEBTS OWED TO YOU** that you would like to forgive upon your death? Y / N
Please describe:

