

**LAW OFFICES OF
MARK O. THURSTON**

**CLIENT INFORMATION
FOR WILL PREPARATION**

Full Legal Name: _____

Date of Birth: _____

Street Address: _____

City, State and Zip Code: _____

Phone Numbers:

Home: (_____) _____

Mobile: (_____) _____

Work: (_____) _____

E-Mail Address: _____

Family Information:

Are you married? _____

If so, full name of Spouse: _____

Do you have any living biological children?: _____

If so, for each of them, provide the following:

Full Name (Living Biological Children)	Date of Birth	City & State of Residence

Do you have any living adopted children? _____

If so, for each of them, provide the following:

Full Name (Living Adopted Children)	Date of Birth	City & State of Residence

Do you have any deceased children, whether biological or adopted? _____

If so, for each of them, provide the following:

Full Name (Deceased Children)	Date of Death	Did He/She have any children?

Have you previously prepared a Last Will and Testament? _____
(If so, please bring it with you when we meet)

On the following page, please describe your thoughts as to how you would like your property distributed on your death. Consider the following:

Who do you want to receive the bulk of your property?

If that person is not living, who should receive the property?

Do you have certain items that you want to go to a certain person? This can be anything from an heirloom or item of sentimental value, a certain item of personal property, some real estate or a set amount of money or a percent of your estate.

If you intend to leave property to your child or children, or any other person, what will happen if that child or person dies before you?

Your ideas for distribution of your money and assets upon your death:
(We will discuss these in detail at the time of your appointment)

A large, empty rectangular box with a black border, intended for the user to write their ideas for the distribution of their money and assets upon their death.

Who would you like to be the Personal Representative of your estate? (This is the same as an Executor. It is the person who is appointed by the court to administer your estate, according to your Will. You may have more than one Personal Representative, who act together.)

Name(s) (Personal Representative): _____

How is this person(s) related to you? _____

If the person you choose as Personal Representative cannot serve, or does not wish to serve, who would you like to act as the Successor Personal Representative?

Name(s) (Successor Personal Representative): _____

How is this person(s) related to you?: _____

Do you want to receive information about the uses and purposes of any of the following?
(Indicate Yes or No)

Trusts: _____

Powers of Attorney: _____

Health Care Powers of Attorney: _____

Living Wills (Advance Directive for Health Care) _____

Nominations of Guardians: _____

If you have any questions or ideas concerning your Will or any other estate planning documents, please set them out below.

Please bring with you to your appointment the following information:

Legal Descriptions and Deeds to any Real Estate owned

Bank Account numbers and names on the account

Investment Account numbers and names on the account

Retirement Account information and beneficiary names

Life Insurance information and beneficiary names.

Information about any money owed to you, by any person.

General description of other property owned.