



Office 2404 Bank Drive, Suite 301
Boise, Idaho 83705

Mailing PO Box 50269
Boise, Idaho 83705

Phone 208-917-1161
Fax 208-576-6099
Website www.lawalternativesidaho.com

WILL & TRUST WORKSHEET

| | |
|--|---------------|
| Name | |
| Age | |
| Date of birth | |
| Address | |
| Email address | |
| Phone number | |
| | |
| Spouse's Name | |
| Age | |
| Date of birth | |
| Address | |
| Email address | |
| Phone number | |
| | |
| Children /Name | Date of birth |
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| | |
| Personal Representative | |
| Alternate Personal Representative | |
| Personal Representative for Spouse | |
| Alternate Personal Representative for Spouse | |
| | |
| Trustee if trusts to be established for minor children, disabled children, spouse or others | |
| Alternate trustee | |
| | |
| Guardian for minor children | |
| Alternate guardian for minor children | |
| | |
| Specific Bequests | |
| Personal property, other than that which is included on a personal property bequest form | |

| | |
|---|-------------------|
| Charitable bequests. Please name entity, address, and any specific purpose of fund to which bequest should be directed. | |
| | |
| Residue of Estate | |
| To Spouse | Yes/no |
| If no spouse, or spouse predeceases you | Children – yes/no |
| If no spouse and no children, then distribute to | |
| | |
| Health Care/Advance Directives | |
| Agent for Health Care (include current address & phone number) | |
| For Spouse | |
| Alternate agent for Health Care (include current address & phone number) | |
| For Spouse | |
| Second alternate agent for Health Care (include current address & phone number) | |
| For Spouse | |
| Statutory Power of Attorney (for finances) | |
| Agent for Financial Matters (include address & phone number) | |
| For Spouse | |
| Alternate Agent for Financial Matters (include address and phone number) | |
| For Spouse | |

| | |
|--|----------|
| Funeral and Burial Instructions | |
| Cremation | Yes / no |
| Burial | Yes/ no |
| | |
| ASSETS | |
| Real Property, location and fair market value | 1. |
| | 2. |
| | 3. |
| | 4. |
| Checking, Savings Accounts and CD's approximate balance (name of bank, type of account, account number not required) | 1. |
| | 2. |
| | 3. |
| | 4. |
| | 5. |
| Investment accounts and approximate balance | 1. |
| | 2. |
| | 3. |
| | 4. |
| Retirement accounts, IRAs, Pensions, Annuities | 1. |
| | 2. |
| | 3. |

| | |
|--|----|
| Life Insurance (whole or term life or burial policy) | 1. |
| | 2. |
| | 3. |
| | 4. |
| Vehicles | 1. |
| | 2. |

| | |
|-------------------------------|--|
| FOR ATTORNEY USE ONLY: | |
| Type of Will | Simple _____ Married w/minor children _____ Single w/minor children _____ A/B Trust _____ Special Needs Trust _____ Other _____ |
| Drafts to be sent via | _____ US Mail _____ E-mail |
| Date drafts sent to client | |
| Signing appointment set | |