

WILL INFORMATION SHEET  
(Short Form)

DATE: \_\_\_\_\_

CLIENT: FULL LEGAL NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP CODE \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_ SS# \_\_\_\_\_

PREVIOUS MARRIAGE? \_\_\_\_\_ ENDED HOW \_\_\_\_\_

DATE OF PRESENT MARRIAGE \_\_\_\_\_

SPOUSE: FULL LEGAL NAME \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_ SS# \_\_\_\_\_

PREVIOUS MARRIAGE? \_\_\_\_\_ ENDED HOW \_\_\_\_\_

CHILDREN'S NAMES:

CHILDREN'S NAMES:

1. \_\_\_\_\_ AGE \_\_\_\_\_ AGE \_\_\_\_\_

2. \_\_\_\_\_ AGE \_\_\_\_\_ AGE \_\_\_\_\_

3. \_\_\_\_\_ AGE \_\_\_\_\_ AGE \_\_\_\_\_

4. \_\_\_\_\_ AGE \_\_\_\_\_ AGE \_\_\_\_\_

PERSONAL REPRESENTATIVES:

NAME \_\_\_\_\_ RELATIONSHIP \_\_\_\_\_

NAME \_\_\_\_\_ RELATIONSHIP \_\_\_\_\_

NAME \_\_\_\_\_ RELATIONSHIP \_\_\_\_\_

NAME \_\_\_\_\_ RELATIONSHIP \_\_\_\_\_

BENEFICIARIES:

\_\_\_\_\_ RELATIONSHIP \_\_\_\_\_ PERCENTAGE \_\_\_\_\_

\_\_\_\_\_ RELATIONSHIP \_\_\_\_\_ PERCENTAGE \_\_\_\_\_

\_\_\_\_\_ RELATIONSHIP \_\_\_\_\_ PERCENTAGE \_\_\_\_\_

\_\_\_\_\_ RELATIONSHIP \_\_\_\_\_ PERCENTAGE \_\_\_\_\_

\_\_\_\_\_ RELATIONSHIP \_\_\_\_\_ PERCENTAGE \_\_\_\_\_