

WILL CLIENT INFORMATION SHEET

Date Interviewed \_\_\_\_\_ Handling Attorney BLM

Source of Business \_\_\_\_\_

\*\*\*\*\*

**Husband's NAME**

\_\_\_\_\_

**Wife's NAME**

\_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip

\_\_\_\_\_

Res. Phone \_\_\_\_/\_\_\_\_/\_\_\_\_ Work Phone \_\_\_\_/\_\_\_\_/\_\_\_\_

Pager \_\_\_\_/\_\_\_\_/\_\_\_\_ Mobile \_\_\_\_/\_\_\_\_/\_\_\_\_

Employer: \_\_\_\_\_

\_\_\_\_\_

**CHILDREN OF THIS MARRIAGE:**

| <u>Name</u> | <u>DOB</u> | <u>Age</u> |
|-------------|------------|------------|
|-------------|------------|------------|

|       |                |           |
|-------|----------------|-----------|
| _____ | ____/____/____ | ____/____ |
|-------|----------------|-----------|

\_\_\_\_\_

|       |                |           |
|-------|----------------|-----------|
| _____ | ____/____/____ | ____/____ |
|-------|----------------|-----------|

\_\_\_\_\_

|       |                |           |
|-------|----------------|-----------|
| _____ | ____/____/____ | ____/____ |
|-------|----------------|-----------|

\_\_\_\_\_

|       |                |           |
|-------|----------------|-----------|
| _____ | ____/____/____ | ____/____ |
|-------|----------------|-----------|

\_\_\_\_\_

Wife's Children of previous marriages:

\_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 \_\_\_\_\_

Husband's Children of previous marriages:

\_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 \_\_\_\_\_

Deceased children? \_\_\_\_\_

Estate over \$600,000 single      \_\_\_\_\_ yes      \_\_\_\_\_ no

\$1.2 million marriage      \_\_\_\_\_ yes      \_\_\_\_\_ no

\*\*\*\*\*FILL OUT TO HERE AND THEN STOP\*\*\*\*\*

Specific Bequest:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Residue?      \_\_\_\_\_ Spouse      \_\_\_\_\_ Children per stirpes

\_\_\_\_\_ Other

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If all deceased, to heirs at law? \_\_\_\_\_ yes \_\_\_\_\_ other

If all deceased, then to:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

First Executor/trix? \_\_\_\_\_ spouse \_\_\_\_\_ other

Name: \_\_\_\_\_  
\_\_\_\_\_

Relationship: \_\_\_\_\_  
—

Second  
Alternate: \_\_\_\_\_  
—

Relationship: \_\_\_\_\_  
—

Third  
Alternate: \_\_\_\_\_  
—

Relationship: \_\_\_\_\_  
—

Powers of Executor? \_\_\_\_\_ Independent \_\_\_\_\_ Bond Waiver \_\_\_\_\_ Full Powers  
\_\_\_\_\_ Compensation

First

Guardian: \_\_\_\_\_  
\_\_\_\_\_

Relationship: \_\_\_\_\_  
—

Second  
Alternate: \_\_\_\_\_  
—

Relationship: \_\_\_\_\_  
—

Third  
Alternate: \_\_\_\_\_  
—

Relationship: \_\_\_\_\_  
—

Trusts?      \_\_\_\_\_ Yes                      \_\_\_\_\_ No

If yes, \_\_\_\_\_ minors trust      \_\_\_\_\_ age      \_\_\_\_\_ other      \_\_\_\_\_ Sep-Trus.Frm

Trustees same as Guardians?      \_\_\_\_\_ yes                      \_\_\_\_\_ no

First  
Trustee: \_\_\_\_\_  
\_\_\_\_\_

Relationship: \_\_\_\_\_  
—

Second  
Alternate: \_\_\_\_\_  
—

Relationship: \_\_\_\_\_  
—

Third  
Alternate: \_\_\_\_\_  
—

Relationship: \_\_\_\_\_

—

Beneficiaries: \_\_\_\_\_ children per stirpes

Other: \_\_\_\_\_  
\_\_\_\_\_