



**II. Marital Status (Continued)**

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

Husband / Wife

Date of Birth: \_\_\_\_\_

**III. Children/Descendants**

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(s)	Gender	Date of Birth	SSN	Child of:

Are you or your spouse currently pregnant? Y N  
*(If so, indicate child's information above)*

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 your child(ren) currently your spouse? Y N

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 persons you name to act as legal guardians of your minor children. The individuals named will have physical control and custody of your 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 you 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 children, please name him/her here:

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**Name and Address**

Successor Guardian for Children: (If the guardian named above is unable or unwilling to act as personal guardian, this person will be next-in-line to act as guardian for your children.

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**Name and Address**

**V. Other**

<b>Spouse 1:</b>	<b>Spouse 2:</b>
<input type="checkbox"/> Has S corporation	<input type="checkbox"/> Has S corporation
<input type="checkbox"/> Owns Medical Practice	<input type="checkbox"/> Owns Medical Practice
<input type="checkbox"/> Owns closely held business	<input type="checkbox"/> Owns closely held business
<input type="checkbox"/> Owns property in WA State	<input type="checkbox"/> Owns property in WA State
<input type="checkbox"/> Owns property out of state	<input type="checkbox"/> Owns property out of state

**VI. Retirement Benefits**

- 401K**
- IRA**
- Other**

**VII. Specific Bequests**

A “specific bequest” distributes a a specific personal item, asset, or amount of money to a specific person or organization.

*Example 1: “I wish to donate \$5,000 to the Red Cross of America.”*

*Example 2: “I wish to give the original Claude Monet painting, titled “The Water Lily Pond”, to my niece Elizabeth Taylor.”*

*Example 3: “I wish to give my entire stamp collection to my daughter Eva Gabor.*

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, please write the desired items and recipients in the spaces provided below. If you need additional space, feel free to attach a list.

#	Item	Recipient
1.		
2.		
3.		
4.		
5.		
6.		
7.		

### **VIII. 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. This residuary estate is given to a "residuary beneficiary". Please choose a residuary beneficiary option from below).

\_\_ My Spouse. However, my spouse is not living upon my death, the residuary estate shall be distributed to my **"issue per stripes"**.

*"Issue per stripes" means that your bequest will follow each child's bloodline. For example, should you die and your spouse has already passed away, if you have two children, the estate would be divided between Child 1 and Child 2. However, if Child 2 has already died, but he/she has a child (your grandchild), the grandchild shall get Child 2's portion of the estate. **Please compare this with the next bequest option.***

\_\_ My Spouse. However, if my spouse is not living upon my death, the residuary estate shall be distributed to my **children then living**.

*This bequest is different from distributing to your "issue per stripes". If you distribute to your "children then living," should you die and your spouse has already passed away, if you have two children, the estate would be divided between Child 1 and Child 2. However, if Child 2 has already died, but he/she has a child (your grandchild), the grandchild will receive nothing and Child 1 will receive the entire residual estate.*

\_\_ My Spouse. However, if my spouse is not living upon my death, the residuary estate shall be distributed to another individual. Please name individual(s): \_\_\_\_\_

\_\_ My issues per stripes.

*"Issues per stripes" means that your bequest will follow each particular child's bloodline. For example, if you die and you have two children, the estate would be divided between Child 1 and Child 2. However, if Child 2 has already died, but he/she*

*has any children (your grandchildren), the grandchildren shall receive Child 2's portion of the residuary estate.*

My children then living. However, if I have no living children, the residuary estate shall be distributed to my then living grandchildren.

*This is different from the above option "issue per stripes". If you have no children still living, the estate will then be divided among any living grandchildren. However, should you have any children still living, the grandchildren of any children who passed away before you will receive no portion of the residuary estate.*

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

Please name the individual(s): \_\_\_\_\_

Please name the alternate individual(s): \_\_\_\_\_

### **IX. Stepchildren**

Do you have step-children? Y N

If no, please skip to section X below.

Step-children are not considered 'children' for the purpose 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 step-children, please list them below:

<b>Name</b>	<b>Date of Birth</b>

Yes, I would like to treat my step-child(ren) as biological or adopted children for the purpose of my will.

*If you select this option, they will be granted a portion of residuary estate according to the residuary estate option you selected in Section VI.*

No, I would not like to treat my step-child(ren) as biological or adopted children for the purpose of my will.

*If you select this option, you may wish to discuss with your attorney how, if at all, you would like any portion of your estate or belongings distributed to your stepchildren.*

**X. Cost of Distributing the Estate**

It helps to know whether you want the estate to pay any shipping cost 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 distributing 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).

**XI. 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 letter of appointment, settling creditor's claims, finding and distributing assets, and filing any necessary tax returns. **Any competent adult (any mentally competent individual over 18)** may serve as your Personal Representative.

*If you do not appoint a Personal Representative, the Court will appoint a Personal Representative for you.*

Who do you 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 you 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

*We recommend that you appoint a successor Personal Representative if possible, just in case your first choice for a Personal Representative has predeceased you or is otherwise unwilling/unable to act as your Personal Representative. Otherwise, the Court will appoint a Personal Representative for you.*

If yes, please name your desire Successor Personal Representative: \_\_\_\_\_



**Financial Power of Attorney:**

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

\_\_\_\_\_  
Name Phone Number Address

Alternate Agent:\_\_\_\_\_

**Medical Power of Attorney:**

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

\_\_\_\_\_  
Name Phone Number Address

Alternate Agent:\_\_\_\_\_

**XIV. 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:

*Giving a reason for the disinheritance increases the likelihood that a court will uphold your will if one of the disinherited children challenges the validity of the will.*

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

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

*If so, would you like the funeral expenses to be paid out of your estate: Y N*

*If so, please indicate any special preferences below (cremation, green burial, etc...)*

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

C. Are there any **DEBTS OWED TO YOU** that you would like to forgive upon your death?

Y N

Please describe:\_\_\_\_\_

\_\_\_\_\_