

WILL INFORMATION SHEET

WHERE DID YOU HEAR ABOUT US?

DATE: _____, 2002

Drove by Office
 Verizon (cover shows a globe)

SWB NETC (cover shows firefighters w/ flag)
 Internet

Referred by: _____

Other: _____

PLEASE PRINT CLEARLY. If corrections must be made because of unclear handwriting, a fee of \$25.00 will be due.

DO YOU WANT WILLS FOR BOTH HUSBAND AND WIFE? Yes No ---- Print Full legal name

MR. _____ MRS. _____

STREET _____

CITY/STATE _____ ZIP _____

PHONE/HIS WORK _____ HER WORK _____ HOME _____

HIS EMPLOYER _____ POSITION _____

HER EMPLOYER _____ POSITION _____

HIS SOCIAL SECURITY NO. ____/____/____ BIRTH DATE ____/____/____

HER SOCIAL SECURITY NO. ____/____/____ BIRTH DATE ____/____/____

IS SPOUSE FIRST CHOICE AS EXECUTOR (person to distribute your estate) OF THE ESTATE? Yes No

ALTERNATE EXECUTOR (person to serve if Executor cannot): _____

RELATIONSHIP TO YOU _____

HIS/HER ADDRESS _____

CHILDREN:

NAME _____ DATE OF BIRTH _____

NAME _____ DATE OF BIRTH _____

NAME _____ DATE OF BIRTH _____

NAME _____ DATE OF BIRTH _____

NAME _____ DATE OF BIRTH _____

Are any of these children step children to either spouse? Yes No

This page needed only if optional trust (for minor children) is desired

WILL TRUST & GUARDIAN INFORMATION

TRUSTEE

PERSON TO ADMINISTER TRUST _____

ADDRESS OF TRUSTEE _____

RELATIONSHIP TO YOU _____

ALTERNATE TRUSTEE

ALTERNATE TRUSTEE _____

ADDRESS OF TRUSTEE _____

RELATIONSHIP TO YOU _____

GUARDIAN

GUARDIAN FOR MINOR CHILDREN _____

ADDRESS OF GUARDIAN _____

RELATIONSHIP TO YOU _____

ALTERNATE GUARDIAN

ALTERNATE GUARDIAN _____

ADDRESS OF ALTERNATE GUARDIAN _____

RELATIONSHIP TO YOU _____

TRUST TO TERMINATE AT AGE _____

Under what conditions should beneficiary receive trust funds if other than for health, education, and general maintenance?

BENEFICIARY (if other than your children) _____