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HUSBAND AND WIFE - WORKSHEETS
Last Will and Testaments, Durable Powers of Attorney, Living Wills
(Please include middle initials for all persons named)

Personal Data (Husband) Last Name _____

First Name _____ Middle Name _____

Social Security No. _____ Birth Date _____

Home Address _____

City _____ Township _____

State _____ Zip Code _____ County _____

Telephone: Residence () _____ Business () _____

Cell () _____ E-Mail _____@_____

Mother's Name: _____ Father's Name: _____

Siblings: _____

Personal Data (Wife) Last Name _____

First Name _____ Middle Name _____

Social Security No. _____ Birth Date _____

Home Address _____

City _____ Township _____

State _____ Zip Code _____ County _____

Telephone: Residence () _____ Business () _____

Cell () _____ E-Mail _____@_____

Mother's Name: _____ Father's Name: _____

Siblings: _____

CHILDREN:

_____	D.O.B.: _____
_____	D.O.B.: _____
_____	D.O.B.: _____
_____	D.O.B.: _____
_____	D.O.B.: _____
_____	D.O.B.: _____

PRIMARY BENEFICIARIES: (If husband and wife are deceased)

1. _____ Percentage of Assets _____
2. _____ Percentage of Assets _____
3. _____ Percentage of Assets _____
4. _____ Percentage of Assets _____
5. _____ Percentage of Assets _____
6. _____ Percentage of Assets _____

CONTINGENT BENEFICIARIES (If husband and wife and all Primary Beneficiaries are deceased):

1. _____ Percentage of Assets _____
2. _____ Percentage of Assets _____
3. _____ Percentage of Assets _____
4. _____ Percentage of Assets _____
5. _____ Percentage of Assets _____
6. _____ Percentage of Assets _____

GUARDIANS OF MINOR CHILDREN:

First Alternate

Second Alternate

NOTES: 1. This would be the person(s) who will care for your children in the event both biological (legal) parents are deceased. 2. It is best to name individuals as Guardian and Alternates.

TRUSTEE(S) FOR BENEFICIARIES UNDER THE AGE OF _____ :

First Alternate

Second Alternate

NOTES: 1. This would be the person designated to manage assets on behalf of minor children that are listed as beneficiaries. 2. Age indicates the age that a Beneficiary is to receive their share of the Estate from the Trustee. This can be a lump sum upon reaching age _____ or in increments as follows: 1/3 at age _____, 1/3 at age _____, and the balance at age _____.

EXECUTOR(S):

First Alternate

Second Alternate

Third Alternate

NOTES: 1. Husband would name Wife and Wife would name Husband and the names of alternates. 2 .It is best to name individuals as Alternates.

DURABLE POWERS OF ATTORNEY/LIVING WILLS

HUSBAND: _____
Last Name First Name Middle Name

**HUSBAND-PRINCIPAL
WIFE - AGENT**

In the event of the incapacity of the originally appointed Agent, the principal should list alternate agents to handle affairs on behalf of the principal. Please list the sequence of Alternate Agents there does not have to be Five (5).

Alternate Agents:

1. _____
Last Name First Name Middle Name

Relationship to the principal: _____ Home Phone: _____ Cell: _____

Address: _____

2. _____
Last Name First Name Middle Name

Relationship to the principal: _____ Home Phone: _____ Cell: _____

Address: _____

3. _____
Last Name First Name Middle Name

Relationship to the principal: _____ Home Phone: _____ Cell: _____

Address: _____

4. _____
Last Name First Name Middle Name

Relationship to the principal: _____ Home Phone: _____ Cell: _____

Address: _____

5. _____
Last Name First Name Middle Name

Relationship to the principal: _____ Home Phone: _____ Cell: _____

Address: _____

NOTES: 1. Generally, the same sequence of Alternates is used for the Durable Powers of Attorneys and Living Wills. 2. Children are usually only listed as Alternates if they are of legal age (18) to serve as an Alternate.

DURABLE POWERS OF ATTORNEY/LIVING WILLS

WIFE: _____
Last Name First Name Middle Name

**WIFE – PRINCIPAL
HUSBAND - AGENT**

In the event of the incapacity of the originally appointed Agent, the principal should list alternate agents to handle affairs on behalf of the principal. Please list the sequence of Alternate Agents there does not have to be Five (5).

Alternate Agents:

1. _____
Last Name First Name Middle Name

Relationship to the principal: _____ Home Phone: _____ Cell: _____

Address: _____

2. _____
Last Name First Name Middle Name

Relationship to the principal: _____ Home Phone: _____ Cell: _____

Address: _____

3. _____
Last Name First Name Middle Name

Relationship to the principal: _____ Home Phone: _____ Cell: _____

Address: _____

4. _____
Last Name First Name Middle Name

Relationship to the principal: _____ Home Phone: _____ Cell: _____

Address: _____

5. _____
Last Name First Name Middle Name

Relationship to the principal: _____ Home Phone: _____ Cell: _____

Address: _____

NOTES: 1. Generally, the same sequence of Alternates is used for the Durable Powers of Attorneys and Living Wills. 2. Children are usually only listed as Alternates if they are of legal age (18) to serve as an Alternate.

RETURN FORMS TO:

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