

WILL DESIGN SHEET – MARRIED/PARTNERS

WILL INFORMATION

Previous Will Date: _____

Testators' Signature Names:

Husband

Wife

Testators' AKAs (e.g. Wife's maiden name(s)):

Husband

Wife

SPECIFIC GIFTS

Specific Gift (To an Individual)

To Whom: _____

Type of Gift: Monetary Gift (outright)

Specific Property: _____

When: ☐ Upon Death of Wife ☐ Upon Death of Husband ☐ After Death of Both

If beneficiary predeceased, distribution shall:

☐ Lapse ☐ To Bene's heirs ☐ Other: _____

Will taxes be apportioned to this distribution? No Yes

Will this distribution pass subject to liens and other encumbrances? No Yes

Specific Gift (To A Charity)

Name of Charity: _____

Charity Type: Existing Char. Org/Found Existing Char. Trust

Type of Gift: Pecuniary: _____

Percentage: _____

Specific Property: _____

When: ☐ Upon Death of Wife ☐ Upon Death of Husband ☐ After Death of Both

If beneficiary predeceased, distribution shall:

☐ Lapse ☐ Similar Charity ☐ Other: _____

Will this distribution pass subject to liens and other encumbrances? No Yes

TANGIBLE PERSONAL PROPERTY

Default is to Spouse or Life Partner and if deceased to Children – *Please Note if Other than Default Desired*

USE OF PERSONAL PROPERTY MEMORANDUM: Do you want to provide that your personal property will be distributed pursuant to a written list you may prepare later?

Any property not listed on the memorandum should be distributed to:

FOR HUSBAND: ☐ Spouse, then children equally. ☐ Children
 ☐ Spouse, then other named individuals. ☐ Other named individuals. List on
 next line.

FOR WIFE: ☐ Spouse, then children equally. ☐ Children
 ☐ Spouse, then other named individuals. ☐ Other named individuals. List on
 next line.

**PROVIDING FOR THE SURVIVING SPOUSE UPON DEATH OF
FIRST SPOUSE TO DIE**

- ☐ All to Spouse
- ☐ Partial to Spouse and partial to children
- ☐ All to Spouse then to children if Spouse predeceased

DIVISION OF PROPERTY UPON DEATH OF SECOND SPOUSE TO DIE

Residuary Beneficiaries after Second Death are:

- ☐ All Individuals **(List if individuals differ from the children/family member list on EP Worksheet)*
- ☐ All Charities
- ☐ Individuals and Charities

**If Individuals differ from named children/family member list on EP Worksheet:*

☐ **Divide Equally Between our Children and the Descendents of any Deceased Children**

☐ **Divide Among Named Individuals and/or Charities according to these directions:**

If Named Beneficiaries, charitable shares, or unequal shares, complete the following (attach separate sheet for more Beneficiaries):

Beneficiary 1:

Name: _____ Relation: _____ Amount/percent: _____

Circle:

Outright UTMA Account

Distribution at Death:

Beneficiaries descendants

Other Beneficiaries pro rata

Remote Beneficiaries

Other: _____

Beneficiary 2:

Name: _____ Relation: _____ Amount/percent: _____

Circle:

Outright UTMA Account

Distribution at Death:

Beneficiaries descendants

Other Beneficiaries pro rata

Remote Beneficiaries

Other: _____

Remote Contingent Distribution (RCB) Provisions: (If no spouse or children alive at last spouse to die)

- ☐ ½ to Grantor's heirs, ½ to spouse's heirs.
- ☐ To Grantor's heirs
- ☐ To the following named individuals and/or charities:

Name	If RC Beneficiary predeceased:
_____	To Descendents or Lapse to RCBs
_____	To Descendents or Lapse to RCBs
_____	To Descendents or Lapse to RCBs
_____	To Descendents or Lapse to RCBs

Any Disinheritance? ☐ Yes ☐ No List Disinherited Persons – name and relationship:

Additional Notes Regarding Distribution of Assets:

GUARDIANS

NOTE: When nominating a couple, decide whether you wish one to take custody if the other is unavailable

Name, Address, and Phone Number

Relationship

_____	_____
_____	_____
_____	_____
_____	_____

TEMPORARY GUARDIANS

Note: Phone should be the one most used

Name, Address, and Phone Number

Relationship

_____	_____
_____	_____
_____	_____
_____	_____

GUARDIANS FOR PETS:

Name

PERSONAL REPRESENTATIVES/EXECUTORS

(Generally will be the same – if distribution/admin trustee, please specify which is PR)

Executors: Name (Together/Consecutively at Death)

HUSBAND (OR BOTH IF SAME)

WIFE

1. _____

1. _____

Or the survivor of them OR Survivor with Next Person

Or the survivor of them OR Survivor with Next Person

2. _____

2. _____

Or the survivor of them OR Survivor with Next Person

Or the survivor of them OR Survivor with Next Person

3. _____

3. _____

Or the survivor of them OR Survivor with Next Person

Or the survivor of them OR Survivor with Next Person