

WILL AND ESTATE INFORMATION

Client's Information:

First, middle and last name:

Address:

Social Security Number:

Spouse's first, middle and last name

Spouse's Social Security Number:

Will:

Name of child(ren):

Date of birth of child(ren):

Name of Personal Representative:

Name of Successor:

Name of Trustee:

Name of Successor:

Name of Guardian(s):

Name of Successor:

Durable Power of Attorney:

Name of POA:

Name of Successor:

Health Care Power of Attorney:

Name of POA:

Name of Successor:

ADDITIONAL INFO:

