

Will Intake Form

A Last Will and Testament is a crucial legal document that allows you to express your final wishes and ensure that your assets are distributed according to your desires after your passing. This intake form will be used to create your Last Will and Testament.

Throughout this form, you will be asked to provide essential information, such as your personal details, marital status, and the names of your beneficiaries. You will also have the opportunity to make important decisions regarding the distribution of your assets, including specific bequests to individuals or organizations, and the appointment of an executor to manage the administration of your estate. Additionally, you will be able to nominate guardians for any minor children or dependents, ensuring their care and well-being in the event of your absence.

Where do you live?

Your final documents will be tailored to your local state laws. This address should be your primary residence.

Address:

What is your full legal name?

Your full legal name will be included in all your legal documents, so be sure to double-check spelling.

Full Legal Name:

Do you have a spouse or partner?

Your current marital status will determine the type of documents for your situation and the specific legal language used to protect both you and your family.

Marital Status (choose one):

- Married
- Domestic Partnership
- Civil Union
- Single

Spouse/Partner Name:

Do you have children?

Include a complete list of children, including all biological and adopted children, as well as any step-children that you wish to treat the same as your biological children in your plan.

Full Name

Birthday

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Who do you choose as executors?

When picking an executor for your Will, choose someone trustworthy, responsible, and capable, ideally with some legal or financial knowledge, who understands your wishes and is willing to act in your best interests.

Executor Name (list primary, then backups if desired)	Relationship

Who do you choose as backup guardians?

Required only if you have minor children

When selecting backup guardians, choose individuals who share your values, are capable of providing a stable and loving environment, and are willing and able to take on the responsibility of caring for your children in your absence.

Guardian Name (list primary, then backups if desired)	Relationship

Who do you choose as backup pet caretakers?

Required only if you have pets

When choosing a caretaker for your pet, select someone who is compassionate, responsible, familiar with your pet's needs, and willing to commit to providing love and care for your pet's remaining lifetime.

Pet Caretaker Name (list primary, then backups if desired)	Relationship
_____	_____
_____	_____
_____	_____

Do you have preferences for final arrangements?

Your final arrangements are a highly personal topic and it is important to share your preferences with loved ones who can help to ensure your wishes are realized.

Final Arrangements:

- Let my executor decide - Your executor will have the discretion to make decisions around your final resting place and any funeral or memorial arrangements.
- I have specific wishes - You can lay out your preferences with burial vs. cremation, as well as specific plans for a funeral or memorial service.

Specific Wishes (if selected above):

Regarding my end of life ceremony, I direct that:

Regarding my body and final resting place, I direct that:
