

Thank you for choosing **The Law Office of Kimberly M. Minicozzi, LLC.** for your estate planning needs. This form was developed as a guideline to help you come prepared to our meeting. Please bring this form with you and we will go over it and answer any questions you might have.

Your will is the distribution of your estate after you die. Your estate includes any money, real estate, personal property, or other holdings you might have. Your estate does *not* include property that is owned 'jointly and severally' with other people, and certain retirement, insurance, and investment accounts that have a beneficiary.

Basic Information:

Your full legal name: _____

Are you married? _____

If so, spouse's legal name _____

Do you have children? _____

Your child(ren)'s name and date(s) of birth:

Name

Date of Birth

_____	_____
_____	_____
_____	_____
_____	_____

If your children are minors, and something happens to you, the other parent will be their caretaker. In the event that something happens to the other parent before you, or if you and the other parent die in what is called a common disaster, you want to be the one who picks the caretaker of your children.

I want the guardian (caretaker) of my children to be: _____

In the event that person cannot take care of my children, I want the contingent guardian to be:

If your children are minors or young adults, you need someone to take care of their inheritance for them and manage their money. This may or may not be the same person as their guardian. I will discuss with you the advantages and disadvantages at your meeting. You also need to decide the age at which you think your children will be responsible enough to handle their own money and property.

I want the trustee to be: _____

In the event that person cannot be my trustee, I want the contingent trustee to be:

The age at which my children can manage their own property: _____

YOUR PROPERTY

List any *specific* item(s) you want to bequeath (give) to a specific person:

Specific Item

Name

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Everything else that was not specifically named, I want to give to:

If the person named above dies before me, I want the remainder of my estate to go to:

**When I go over this form with you I will explain the difference between 'per capita' and 'per stirpes' and other methods of distribution. **

EXECUTOR

The executor is the person who handles your estate for you after you die. This person will submit your will to the probate court, and see that your property is distributed as you wish. This person will also make sure that your bills are paid. This should be someone that is capable of handling the financial matters of your estate. It is also helpful if this person lives near you, so that they have easy access to your property and the appropriate court. I want my executor to be: _____

If that person can't be my executor, I want the contingent executor to be:

OTHER

Please use the space below to jot down any notes or questions you might have for me.

Thank you again for choosing **The Law Office of Kimberly M. Minicozzi, LLC.** for your estate planning needs. Thinking about the information on this form is the first step towards knowing that your wishes will be honored. I look forward to meeting with you and helping you make these most important decisions.