

Beers|Mallers,LLP

ATTORNEYS AT LAW

Write A Will 2021

Please complete this form and bring it with you to your appointment.
In order to receive a free will, you must leave a bequest to PBS-39 or another charity.
If married, please have each spouse fill out a form.

PLEASE PRINT

Your name as you will sign on your will: _____

Address: _____

Phone Number: _____

Date of Birth: _____

Your marital status: _____ Name of Spouse: _____

Second or Subsequent Marriage: YES NO

Imagine that everything you own when you die (house, car, bank accounts) is sold so that it is all turned into cash and deposited into a checking account. This checking account is your "Estate."

Would you like to leave a charitable bequest to PBS-39? _____

Amount or Percentage: _____

(For Example: \$550 or 2% of net estate)

Other Charities:

a. Charity's Official Name: _____

Address: _____

Amount or Percentage: _____

b. Charity's Official Name: _____

Address: _____

Amount or Percentage: _____

Children/Heirs:

Relationship:

Amount or Percent of
Your Estate:

Name any heirs (Spouse, Children or Grandchildren that you want excluded from your will):

Who will serve as your Personal Representative? (This person will pay your final bills and distribute your Estate according to your Will after you die). Must be at least 18 years of age.

1. Primary (Spouse?) _____ Relationship: _____
Address: _____

2. Alternate: _____ Relationship: _____
Address: _____

If you have children under age 18 and both you and their other parent dies, who will serve as their guardian? (Your children will live with this person. The Guardian will make all parental decisions for your children until they reach age 18).

1. Primary: _____ Relationship: _____
Address: _____

2. Alternate: _____ Relationship: _____
Address: _____

If you have children under age 18 and both you and their other parent dies, who will serve as the Trustee of any funds you leave to them?

1. Primary: _____ Relationship: _____
Address: _____

2. Alternate: _____

Relationship: _____

Address: _____

At what age would you want your children to receive the funds held in trust? For example, all at age 25? Or, 1/3 at 25 years old, 1/2 at 30 years old and the remainder at 35. This is something you can discuss further with your attorney.

Other Information: