



Will Information Form

Answering these questions will help you think through how you want your property to be distributed when you die, and your answers will give us the information we need to write your Will. If you need additional space or need to make notes, please do. If you have questions, ask us! Our phone number is 504-581-4043, and you should dial extension 204 to speak to Staff Attorney Joe Ballard.

When you have finished, please send this form to us by mail, fax, or email –

Mail:	Fax:	Email:
Attn: Intake The Pro Bono Project 935 Gravier St., Suite 1340 New Orleans, LA 70112	504-566-0518	<u>intake@probono-no.org</u>

PERSONAL INFORMATION

1. What is your full legal name? (Name on your driver's license and/or Social Security Card)

2. What Parish do you live in? _____

3. What is your date of birth? _____

4. What are the last 4 digits of your Social Security number? _____

5. What is your current Marital Status:

_____ Single, never married.

_____ Married.

_____ Divorced, not re-married.

_____ Divorced, re-married.

_____ Widowed, re-married.

_____ Widowed, not re-married.

6. If you are now married, or you are now separated but not divorced, list:

- Spouse’s full legal name _____
- Spouse’s date of birth _____
- Last 4 digits of Spouse’s Social Security number _____

7. If you are now married, or if you are now separated but not divorced: do you have a written prenuptial agreement? ____Yes ____No

8. If you have ever been divorced or widowed, please tell us:

Spouse’s full name:	How did marriage end?	Date of divorce or deceased spouse’s date of death:	Parish where death or divorce occurred:
	____ death ____ divorce		
	____ death ____ divorce		
	____ death ____ divorce		

9. Are there any special reasons or circumstances why you are seeking a will at this time?

10. Have you ever signed a will before? ____Yes ____No

11. If yes to Question 10, did you register the Will in a courthouse or with the Secretary of State?

____Yes ____No

12. If yes to Question 11, where, and when did you register the Will? _____

YOUR CHILDREN

13. Please name all your children, both biological and adopted – If a child is deceased, please provide date of death, and list their children’s names and indicate they are your grandchild:

_____ Date of Birth: _____

_____ Date of Birth: _____

_____ Date of Birth: _____

_____ Date of Birth: _____

_____ Date of Birth: _____

_____ Date of Birth: _____

14. If any of your children are minors AND are also the biological or adopted children of your current spouse, name them here: _____

15. If any of your children or grandchildren are disabled, please name the child and briefly describe the disability: _____

16. Are you the legal guardian of any minors who not your own biological or adopted children?

____Yes ____No

17. If yes to Question 16, what is your relation to each of the minors? _____

18. Do you intend for your children to inherit from you equally? ____ Yes ____ No

19. If not, how would you like your property divided after you die? (Please state in percentages)

GUARDIAN FOR MINOR CHILDREN

20. *If you have minor children (less than 18 years old), you will want to select someone to look after your children and their money if something happens to both you and your spouse. Usually, it is recommended that you choose an individual (not a married couple) to avoid confusion in the event of a divorce.*

Name and birth date of 1st choice guardian:

Name and birth date of 2nd choice guardian:

DISINHERITING A CHILD

21. *In Louisiana, a child can only be disinherited by a parent or grandparent under certain circumstances. The attorney who writes your Will can explain more about disinheritance and can tell you whether you can legally disinherit your child or grandchild. Please let us know if you intend to disinherit any children: ____ Yes ____ No*

REAL PROPERTY

22. Do you own a home? ____ Yes ____ No

23. If yes to Question 22, what is the address (including parish and zip code)?

24. Is this home owned jointly with anyone? ____ Yes ____ No

25. If yes to Question 24, list all co-owners of the property:

26. Do you own any other property or real estate? ____ Yes ____ No

27. If yes to Question 26, please give the address(es), including parish and zip code:

28. Do you jointly own any of the property listed in question 27 with someone else?

____ Yes ____ No

29. If yes to Question 28, please name every co-owner of each property:

30. Do you own any cars or other vehicles (including boats, RV's, etc.)? ____ Yes ____ No

31.If yes to Question 30, give general description of each vehicle:

OTHER INFORMATION

32.Do you have a cemetery plot or mausoleum space? ____Yes ____No

33.If yes to Question 32, where is it located? _____

34.Do you have a safety deposit box? ____Yes ____No

35.If there are any joint owners of a safety deposit box, name them here: _____

36.Where is the safety deposit box located? _____

PERSONAL REPRESENTATIVE (EXECUTOR/EXECUTRIX)

37.Who will be responsible to take your will to the attorney when you die and work with the attorney to ensure your estate is administered according to your wishes? *Choose someone who you believe is willing and able to handle the job. You should inform that person that you are choosing them as your executor.*

38.Who is your first choice? Name: _____

39.Their relationship to you: _____

40.If they die before you or do not want the responsibility, who is your second choice?

Name: _____

41.Their relationship to you: _____

SPECIFIC BEQUESTS

42. *If everything goes to the child(ren) with no exceptions, you can skip this section. Otherwise, this section can be used to list any items that should go to one heir over the others, or items going to any other family member, friend, etc.*

You do not need to list every item you own, only those special items that you want to leave to specific people in your life. This could include jewelry, family heirlooms, antiques or art, or anything else of value or with special significance to you.

Item:	Distributed to:

RESIDUAL BENEFICIARY

43.If everyone to whom you want to leave something dies before you, and all their descendants die before you, do you want to leave everything to an organization (such as a church, a school, a charity, a political organization, etc.)? _____Yes _____No

44.If yes to Question 43, list the organization here:

* THE END *