

**THE LAW OFFICE OF
MICHAEL A. MARKOWITZ, P.C.**

1553 Broadway
Hewlett, NY 11557-1427
Telephone: (516) 295-9061
Telecopier: (516) 740-2880
E-Mail: attorney@mampc.net

Michael A. Markowitz
Sharon Azmon (Paralegal)

Of Counsel
Steven H. Sewell, P.C.

CONFIDENTIAL

Dated: _____

LAST WILL AND TESTAMENT INFORMATION SHEET

(Add additional pages if necessary)

1. PERSONAL DATA-CLIENT.

(a) Full Legal Name: _____

(b) Address: _____

(c) Phone. (Home. _____) (Cell. _____)

(d) email address: _____

(e) Aliases, nicknames, surnames: _____

(f) Date and place of birth: _____

(g) Marital status (Single / Married): _____

(h) Date and place of marriage if married: _____

(i) Pre- or postnuptial agreement (Yes ____ No ____)

(j) Prior marriages (if applicable)

i. Date of Marriage: _____

ii. Name of former spouse: _____

iii. How terminated (Divorce or Death): _____

iv. Date of termination: _____

- (k) Occupation: _____
- (l) If retired, former occupation and employer: _____
- (m) Military service-branch, grade, serial number. _____
- (n) Location of safe deposit box, if any _____
- (o) Practicing Religion _____

2. PERSONAL DATA-CLIENT'S SPOUSE (IF APPLICABLE)

- (a) Full Legal Name: _____
- (b) Address: _____
- (c) Phone. (Home. _____) (Cell. _____)
- (d) email address: _____
- (e) Aliases, nicknames, surnames: _____
- (f) Date and place of birth: _____
- (g) Marital status (Single / Married): _____
- (h) Pre- or postnuptial agreement (Yes or No): (Yes ____ No ____)
- (i) Prior marriages (if applicable)
 - i. Date of Marriage: _____
 - ii. Name of former spouse: _____
 - iii. How terminated (Divorce or Death): _____
 - iv. Date of termination: _____
- (j) Occupation: _____
- (k) If retired, former occupation and employer: _____
- (l) Military service-branch, grade, serial number. _____
- (m) Location of safe deposit box, if any _____
- (n) Practicing Religion _____

3. PERSONAL DATA – CHILD NO. 1:

(a) Full legal name: _____

(b) Date and Place of Birth: _____

(c) Address: _____

(d) Phone: _____

(e) If adopted, date of adoption: _____

(f) Out of wedlock (Yes or No): (Yes ____ No ____)

4. PERSONAL DATA – CHILD NO. 2:

(a) Full legal name: _____

(b) Date and Place of Birth: _____

(c) Address: _____

(d) Phone: _____

(e) If adopted, date of adoption: _____

(f) Out of wedlock (Yes or No): (Yes ____ No ____)

5. PERSONAL DATA – CHILD NO. 3:

(a) Full legal name: _____

(b) Date and Place of Birth: _____

(c) Address: _____

(d) Phone: _____

(e) If adopted, date of adoption: _____

(f) Out of wedlock (Yes or No): (Yes ____ No ____)

6. PERSONAL DATA – CHILD NO. 4:

(a) Full legal name: _____

(b) Date and Place of Birth: _____

(c) Address: _____

(d) Phone: _____

(e) If adopted, date of adoption: _____

(f) Out of wedlock (Yes or No): (Yes ____ No ____)

7. PERSONAL DATA – EXTENDED FAMILY:

(a) Full Legal Name of Father and Mother: _____

(b) Date of Death of Each parent: _____

(c) Address of parent: _____

(d) Full Legal Name of Each Sibling: _____

(e) Date of Death of Each Sibling: _____

(f) Address of each Sibling: _____

(g) Full Legal Name of Each Nephew or Niece: _____

(h) Date of Death of Each Nephew or Niece: _____

(i) Address of each Nephew or Niece: _____

8. PERSONAL DATA – SPOUSE EXTENDED FAMILY:

(a) Full Legal Name of Father and Mother: _____

(b) Date of Death of Each parent: _____

(c) Address of parent: _____

(d) Full Legal Name of Each Sibling: _____

(e) Date of Death of Each Sibling: _____

(f) Address of each Sibling: _____

(g) Full Legal Name of Each Nephew or Niece: _____

(h) Date of Death of Each Nephew or Niece: _____

(i) Address of each Nephew or Niece: _____

9. BENEFICIARIES.

A beneficiary is an individual or entity that is to receive money or property under a will. Please state the legal name and address of each beneficiary. If this section is left blank it will be assumed that the beneficiary is the spouse, and upon death of the spouse, the children.

10. SPECIFIC BEQUEST

A specific bequest is property (ex. jewelry) that is to be delivered to an identified individual or entity. A will does not have to include a specific bequest.

11. FIDUCIARIES.

(a) Executor: An executor is an individual or an entity that is responsible for the enforcement of the Will and is a representative of the estate. This includes but is not limited to hiring attorneys and accountants, payment of debt, filing tax returns, and doing such other things that the decedent would have done had he or she been alive. The executor may be the same or different than the Guardian or Trustee.

Primary Executor:

- i. Full legal name. _____
- ii. Address _____
- iii. Telephone number. _____

Alternate Executor:

- i. Full legal name _____
- ii. Address _____
- iii. Telephone number. _____

(b) Guardian. A guardian is an individual that is responsible for the minor child or children of the decedent. The guardian may be the same or different than the Executor or the Trustee.

Primary Guardian:

- i. Full legal name. _____
- ii. Address _____
- iii. Telephone number. _____

Alternate Guardian:

- i. Full legal name. _____
- ii. Address _____

iii. Telephone number. _____

(c) Trustee. A trustee is an individual that is responsible for a trust established in the Will. A trust is a sum of money held for the benefit of an individual (the beneficiary). The beneficiary may be a minor. The guardian may be the same or different than the Executor or the Guardian.

i. Full legal name. _____

ii. Address _____

iii. Telephone number. _____

Alternate Trustee:

i. Full legal name. _____

ii. Address _____

iii. Telephone number. _____

12. ASSETS AND TYPE OF OWNERSHIP.

(Approximate monetary value)

(a) Personal property.

i. Collectibles. _____

ii. Antiques. _____

iii. Works of art. _____

iv. Furs and jewelry. _____

v. Motor vehicles. _____

(b) Cash and cash equivalents

i. Savings accounts. _____

ii. Checking accounts. _____

iii. Time deposits. _____

iv. "In trust for" accounts. _____

v. Money market accounts. _____

- vi. Treasury bills. _____
- vii. Credit union accounts. _____

(c) Securities.

- i. Stocks _____
- ii. Tax exempt bonds _____
- iii. Corporate bonds _____
- iv. Custody management accounts _____
- v. Savings bonds _____
- vi. Investment management accounts _____
- vii. Promissory notes and mortgages _____

(d) Life insurance, annuities, and employee benefits

- i. Face amount of life and group insurance owned on self _____
- ii. Face amount of life and group insurance owned on others _____
- iii. Stock options _____
- iv. Deferred compensation _____
- v. Post-death salary _____
- vi. Vested pension rights and profit sharing plans _____
- vii. Employee benefit plan statements, summary plan statements and employment literature to determine other benefits. _____
- viii. I.R.A. _____

(e) Business interests.

- i. Proprietorship. _____
- ii. Professional practice _____

- iii. Closely held business interests _____
- iv. Joint ventures _____
- v. Partnership interest _____
- vi. Royalties _____
- vii. Commissions _____

(f) Real estate (fair market value)

- i. Principal residence _____
- ii. Vacation residence _____
- iii. Other residences _____
- iv. Undeveloped property _____

13. LIABILITIES.

(Approximate monetary value)

- (a) Judgments _____
- (b) Bank loans _____
- (c) Credit Card Debt _____
- (d) Personal promissory notes _____
- (e) Accounts payable _____
- (f) Pledges _____
- (g) Taxes owed _____
- (h) Other _____

14. ADVISORS.

(a) Physician

- i. Name _____
- ii. Address _____

iii. Phone _____

(b) Life insurance agent

i. Name _____

ii. Address _____

iii. Phone _____

(c) Casualty insurance broker

i. Name _____

ii. Address _____

iii. Phone _____

(d) Accountant.

i. Name _____

ii. Address _____

iii. Phone _____

(e) Investment advisor

i. Name _____

ii. Address _____

iii. Phone _____

(f) Securities custodian

i. Name _____

ii. Address _____

iii. Phone _____

(g) Clergyman

i. Name _____

ii. Address _____

iii. Phone _____

15. MISCELLANEOUS.

Please set forth any other instructions that you would like to place in your Will. This may include, but is not limited to: Charitable bequests, funeral, or cremation requests, donating body to science, etc.