

ESTATE PLANNING DOCUMENT TEMPLATE

Prepared For: _____ Attorney: _____

Client Information:

Full Legal Name: _____

Date of Birth: _____ Social Security Number: _____

Address: _____

Phone/Email: _____

Executor / Personal Representative:

Full Name: _____

Address: _____

Phone/Email: _____

Primary Beneficiaries:

Full Name: _____ Relationship: _____

Full Name: _____ Relationship: _____

Alternate Beneficiaries:

Full Name: _____ Relationship: _____

Full Name: _____ Relationship: _____

Guardianship of Minor Children (if applicable):

Guardian's Full Name: _____

Guardian's Address: _____

Healthcare Directive and Power of Attorney:

Healthcare Agent Full Name: _____

Healthcare Agent Address: _____

Power of Attorney Agent Full Name: _____

Power of Attorney Agent Address: _____

Article 1 – Declaration

I, the undersigned, being of sound mind and legal capacity, declare this as my Last Will and Testament and direct that all prior wills and codicils are revoked.

Article 2 – Family Information

I am married to _____ and have the following children: _____. This Will reflects my intent regarding distribution of my estate.

Article 3 – Appointment of Executor

I appoint the person named above as Executor of this Will, authorizing them to administer and distribute my estate

according to this document and applicable law.

Article 4 – Payment of Debts and Expenses

I direct that all my just debts, funeral expenses, and expenses of administering my estate be paid as soon as practicable after my death.

Article 5 – Disposition of Property

I give, devise, and bequeath my estate as follows: to my primary beneficiaries as listed above, share and share alike. If any beneficiary predeceases me, their share shall pass to their descendants per stirpes.

Article 6 – Residuary Clause

All the rest, residue, and remainder of my estate, of whatever kind and wherever located, I give, devise, and bequeath to my primary beneficiaries equally, or as otherwise specified.

Article 7 – Guardianship of Minor Children

If at my death any of my children are minors, I appoint the guardian named above to have custody and care of such children.

Article 8 – Powers of the Executor

My Executor shall have all powers granted by law, including selling assets, settling claims, employing professionals, and distributing the estate.

Article 9 – Healthcare Directive

I direct that my healthcare agent shall have the authority to make medical decisions on my behalf if I am unable to do so.

Article 10 – Durable Power of Attorney

I grant my power of attorney agent the authority to act on my behalf in financial and legal matters during my lifetime.

Article 11 – No Contest Clause

Should any beneficiary contest this Will, they shall forfeit their share, which shall be distributed as if they predeceased me.

Article 12 – Governing Law

This Will shall be governed by and construed in accordance with the laws of the state of _____.

Article 13 – Signatures and Witnesses

I sign this Will voluntarily in the presence of the undersigned witnesses, who attest to my capacity and that I declared this to be my Last Will and Testament.

Article 14 – Attestation Clause

We, the undersigned witnesses, declare that the Testator signed this Will in our presence and appears to be of sound mind and under no undue influence.

Article 15 – Self-Proving Affidavit

For convenience, this Will may be accompanied by a self-proving affidavit executed by the Testator and witnesses according to state law.

Article 16 – Revocation of Prior Wills

All prior Wills and codicils are hereby revoked, except as otherwise stated herein.

Article 17 – Severability

If any provision of this Will is invalid or unenforceable, the remaining provisions shall remain effective.

Article 18 – Additional Provisions

Any other provisions or special instructions may be set forth in attached schedules or addenda incorporated herein.

TESTATOR'S SIGNATURE

WITNESS 1 SIGNATURE

WITNESS 2 SIGNATURE

Signature: _____ Signature: _____ Signature: _____

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