

# Last Will and Testament Package Information Worksheet

## 1. Personal Information:

- Full Legal Name: \_\_\_\_\_
  - Address: \_\_\_\_\_
  - City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_
  - Date of Birth: \_\_\_\_\_ Marital Status: \_\_\_\_\_
  - Name of Spouse/Partner (if applicable): \_\_\_\_\_
    - If spouse has passed, provide name and date of death: \_\_\_\_\_
  - Names of Children/Dependents and birthdates (if applicable): \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## 2. Executor Selection:

- Who do you want to appoint as the Executor of your Will? (Executor is responsible for carrying out the terms of the Will) Include contact information: \_\_\_\_\_
  - Alternate Executor (optional, in case the primary Executor is unable to fulfill their duties) Include contact information: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## 3. Guardianship of Minor Children (if applicable):

- Who would you like to appoint as the guardian(s) of your minor children in the event of your death or incapacity? Include contact information: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- Alternate Guardian(s) (optional) Include contact information: \_\_\_\_\_  
\_\_\_\_\_

**4. Assets and Debts:**

- **List of Assets** (e.g., real estate, vehicles, investments, bank accounts, retirement accounts, valuable possessions) *This information does not get written into your will. This is to help you organize and inventory your assets. Keep this information with your Will:*

- Description of Asset: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Estimated Total Value: \_\_\_\_\_

- **List of Debts** (e.g., mortgages, loans, credit card debts) *This information does not get written into your will. This is to help you organize and inventory your debts. Keep this information with your Will:*

- Creditor and amount owed: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. **Beneficiaries:**

- Who do you want to inherit your residual assets? Include full names and relationship to you) Also specify what each beneficiary will inherit (e.g., specific assets, percentage of estate) and list an alternate beneficiary (if any) in the event that your first choice predeceases you. *e.g. 25% to Jane. S. Doe, if she is deceased, her share to John P. Snow*

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6. **Specific Bequests:**

- Do you have any specific items or amounts you want to leave to particular individuals or organizations? (e.g., family heirlooms, charitable donations) Specific bequests are distributed before the residual estate assets. *e.g.: \$5000.00 to Mary L. Lamb*

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7. **Disinheritance Clause:** Is there a natural heir you wish to disinherit? (Someone who is related by blood or adoption to a person who has died and is entitled to receive their property.) *e.g. A brother, or child.*

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8. **Durable Power of Attorney:** Who do you want to appoint as your Agent to make financial decisions and to handle financial affairs on your behalf if you become incapacitated and unable to make decisions for yourself? List any alternate agents in the event that your primary Agent is unwilling or unable to serve. Include contact information.

Primary agent name and address: \_\_\_\_\_

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First Alternate name and address: \_\_\_\_\_

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Second Alternate name and address: \_\_\_\_\_

**9. Medical Proxy:**

- **Advanced Health Care Directive:** Who do you want to be your medical proxy? Name any alternates (optional) and list in order of succession along with contact information:

Primary agent name and address: \_\_\_\_\_

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First Alternate name and address: \_\_\_\_\_

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Second Alternate name and address: \_\_\_\_\_

- **HIPAA Authorization:** Medical proxy agents are automatically included on the HIPAA Authorization. List any people you want added:

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**10. Funeral and Burial Wishes:**

- Do you have any specific wishes regarding your funeral or burial arrangements? (e.g., *burial vs. cremation, religious or cultural preferences, only this information is written in the Will; the following is not*) Include a budget you want spent, if any. Make notations of the people you want notified of your passing.

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**11. Digital Assets and Accounts:**

- **List of digital assets** (e.g., email accounts, social media accounts, cryptocurrency, digital files) *This information does not get written into your will. This is to help you organize information your people will need in order to handle your affairs. Keep this information with your Will:*

- **Access Information** (username/password):

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- **Instructions** for managing or distributing digital assets:

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This worksheet is intended for informational and organizational purposes only.  
It does not constitute legal advice. Prepared by Maria Weston, Legal Document Assistant, Los Angeles County.  
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