

WELCOME TO THE LEGAL ASSISTANCE OFFICE!

Enclosed you will find four items:

- (1) A Will Questionnaire
- (2) Client Intake Sheet
- (3) Executor's Checklist
- (4) Letter of Guidance

1. This package is provided to assist you in the completion of your will. Once you have filled out the attached worksheet and client intake sheet, you may return them to this office during normal business hours (Monday through Thursday, 0800-1100 and 1300-1600) or email completed worksheet to hollowaym@mfr.usmc.mil. No appointment is required to drop off or email these items. If you are deploying within one month's time, please let the clerk know when you drop off the worksheets. Please keep the Letter of Guidance and the Executor's Checklist to include with your executed will.
2. After we have completed your will, we will call you to schedule an appointment with one of our attorneys for the following week to discuss your will.
3. This office is restricted in the types of wills that we can prepare. We can prepare basic wills and trusts, but are presently unable to accommodate those needing specific trusts and wills valued at over \$1,000,000 per couple (value includes life insurance policies). Estates exceeding \$1,000,000 may require sophisticated estate planning. If your estate exceeds \$1,000,000, we urge you to contact a civilian attorney.
4. It is the policy of this office to execute all wills within 60 days from receiving the will worksheet. This office will close will files after they are over 60 days old and attempts to contact the client have failed.
5. Please remember that the completeness and accuracy of the information provided in your will worksheet will directly impact the amount of time involved in preparing your will - include middle names, addresses and phone numbers where applicable. If any information changes, please contact this office.

I. ABOUT THE WILL QUESTIONNAIRE? The Will Questionnaire is to help us speed up and simplify the process of preparing a will for you. In this cover letter we try to answer some common questions.

II. DO YOU NEED A WILL? If you don't have a will, most states presume that you want your estate to go to your next of kin. Your next of kin is usually defined as your spouse. Therefore, all of your possessions would go to your spouse if you died without a valid will. If you are not married, then your estate would go to your children. If you had no children, then your parents, followed by your brothers and sisters, aunts and uncles, cousins, etc would follow as beneficiaries. Finally, if you have no living relatives, your estate goes to the state.

If you don't want your estate to be inherited in this progression, then you should have a will. Also, if you have children it is a good idea to

designate a Guardian (the person who will look after your children if you and the other parent die). If you have specific gifts, this should also be stated in a will. Finally, having a valid will shortens the time required to settle the estate and generally costs less than the fees for state involvement.

III. SIMPLE WILLS ONLY!! The Legal Assistance Office prepares only simple wills. If you have an estate worth over \$1,000,000 (*including* life insurance benefits), then you should contact an attorney who specializes in estate planning. There are substantial federal gift and estate taxes on estates over \$1,000,000. A qualified attorney may be able to set up simple trusts and other devices to protect your assets so that your heirs, and not your uncle (Sam) inherit your estate. Please feel free to discuss your options with a Legal Assistance Officer.

IV. WHAT ABOUT LIFE INSURANCE PROCEEDS? Life insurance proceeds are usually not passed through your will, however, as stated above, they are usually taxed as part of your estate. Life insurance beneficiaries are listed on the policy (or on your Page Two in the case of SGLI) and are not effected by the will. One exception is when there is no beneficiary listed on the life insurance policy, only then does the will determine who gets the money.

V. WHAT ABOUT SPECIAL GIFTS? A Special Gift (also known as a Specific Bequest) is a gift of a particular item to a certain person, charity, or corporation. For example, "I leave my blue, fur pajamas with the fire engines on them to my cousin Timothy Greene of Nashville, Tennessee." If you have some specific bequests list them. Please make this list brief by confining it to important (i.e., valuable) items. If you have a more extensive list of gifts, it is more practical to list these gifts in your Letter of Instruction.

VI. WHAT IS A BENEFICIARY? A "beneficiary" is the person or persons who will inherit your estate when you die. The First Beneficiary (or Beneficiaries) will receive everything. The Second Beneficiary gets nothing unless *all* the people listed as First Beneficiaries die before you do. Usually, your spouse is listed as the First Beneficiary and your children are listed as your Second Beneficiaries. The same formula applies to Third Beneficiaries (i.e., they receive nothing unless all those listed as Second Beneficiaries pre-decease you).

VII. PER STIRPES VS. PER CAPITA? There are two ways to leave your estate to your children; Per Stirpes and Per Capita. For example, if your spouse does not survive you but two children (named Alfa and Bravo) survive you, then Alfa and Bravo would each get 50% of your estate. Suppose Alfa died before you and left a child (named Alfa, Jr.). Where should Alfa's 50% of your estate go? To Bravo, or to Alfa, Jr.?

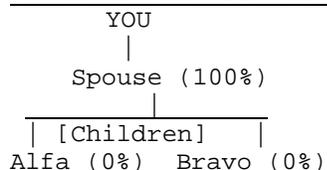
If you want Alfa's share to be inherited by Alfa's children then the share passes per stirpes (think of it as "down the stripe"). If you want Bravo to get the entire estate (thus shutting out Alfa's children), then the estate passes per capita. Per Capita distribution looks at the number of surviving heads (capitas) on the generation line.

Please indicate whether you desire Per Stirpes or Per Capita. Feel free to discuss with the Legal Assistance Attorney the benefits of each

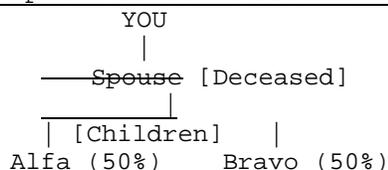
scheme. If you do not indicate either, then we will assume you intend Per Stirpes distribution (as this is most common).

Examples of Per Stirpes v. Per Capita Distribution to Children

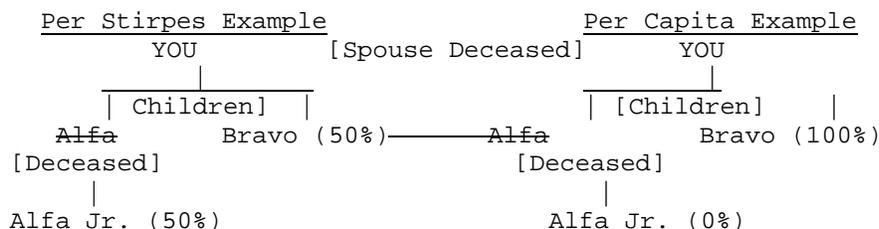
"Standard Distribution"



"Spouse Deceased Distribution"



"Spouse and Child Deceased Example"



VIII. WHAT IS AN EXECUTOR? An "Executor" or personal representative is the person who will see that your estate is distributed according to the will. Because this person will often be required to file in your local Probate Court, it is preferable that the Executor lives in or near the state where the bulk of your property is located. Your executor receives a fee for his services out of the proceeds of the estate and may use this fee to hire someone else (like a probate attorney) to meet the Probate Court's requirements.

IX. WHAT TO DO ABOUT MY MINOR CHILDREN? There are two issues you should be concerned about if you die and your children are still minors -- (1) who will raise them, and (2) who will handle the property (or money) they inherit.

(a.) Appointing a Trustee: If your children are minors, they are not able to have control over any money they inherit until they reach the age of majority (18) or any age that you deem appropriate. Until that time either the Guardian will handle their money for them, or a Trustee will handle the money for the children's benefit. In the case where the Guardian and Trustee are separate people, the Guardian must request permission from the Trustee to get money for the children.

(b.) Appointing a Guardian: The person you designate to raise your children should you and the children's other parent die, is called the Guardian. This person should be the person who will best take care of your children, as opposed to the person who is the wealthiest. In most cases, your life insurance will provide enough money to take care of your children.

(c.) Guardian of Person and Property for Minor Children by a Former Marriage: Generally, the surviving natural parent will be determined to be the Guardian of his or her children unless there is a good reason to deny that parent Guardianship. You may designate another person to be Guardian of your children by a former marriage in the event that the surviving natural parent is unfit or unable to be Guardian.

X. WHAT IS A LIVING WILL? A Living Will expresses your desire not to be kept alive on life support or by intravenous feeding if you are suffering from a terminal illness or injury (dying), unlikely to lead a meaningful life again, and are unable to speak for yourself. Without a Living Will, medical treatment generally cannot be terminated. (Ask a Legal Assistance Officer for Living Will handout if you have more questions.)

XI. WHAT IS A POWER OF ATTORNEY? A Power of Attorney is a written document that gives some other person (your agent or 'attorney-in-fact') authority to perform certain acts on your (the principal's) behalf.

(a.) **Durable.** Ordinarily, a Power of Attorney terminates at the death or incapacity of either the principal or agent. A "Durable" Power of Attorney remains valid despite the incapacity of the principal.

(b.) **POW-MIA.** The Soldiers' and Sailors' Civil Relief Act extends any Power of Attorney for a service member in a POW-MIA status.

(c.) **Medical Power of Attorney.** A Medical Power of Attorney gives your agent authority to make health care decisions for you if you become incapacitated.

XII. WHAT IS THE LETTER OF INSTRUCTION? A Letter of Instruction is not legally binding, but tells your heirs what your intent is. Generally, items of sentimental value are listed on this document. Also, it helps your Executor locate your assets and debts so that he or she does not have to go on a treasure hunt when you die. The Letter of Instruction should be kept with the will so that your Executor will find it.

XIII. THINGS YOU SHOULD THINK ABOUT?

(a.) **Procedures:** After filling out the Will Questionnaire, the Legal Assistance Office will type a will and the related documents for you to sign (this usually takes about two weeks). When we have prepared the will and related documents, we will call you to schedule an appointment to meet with one of our attorneys to review your documents and answer any questions you may have. We will then schedule your will execution.

(b.) **Where to Keep the Will:** Do *not* keep your will, living will or related powers of attorney in a safe deposit box. When you die, your bank will seal the safe deposit box and your Executor will need the will to get into the safe deposit box. Keep the will and related documents that we prepare in a fireproof box or cabinet and let your Executors know where it is. Also, let the Executors know where your valuables are located. The Letter of Instruction is intended to do that.

(c.) **Don't Make Photocopies:** We recommend that you not make photocopies of these documents. Photocopies are not valid for any legitimate purpose (as they are not admissible in court). If you decide to destroy your will and make a new one, it becomes more difficult if there are photocopies floating around. Also, do not remove the staples or the cover of the will.

(d.) **What to do with Old Wills?** You should physically destroy any old wills. Putting a line through an old will does not destroy it. Do not make pen and ink or other changes to a will. To amend a will you must make a new

will or codicil (an attachment) and they must be signed in front of two witnesses and a notary.

(e.) Documents on File: Birth and marriage certificates should be obtained as part of estate planning.

XIII. EXPRESS YOUR INTENT: Your will should reflect your wishes on how your property is to be distributed when you die. No one else should make these very personal decisions for you. If you believe that someone is trying to influence you, you should speak to your Legal Assistance Attorney about it.

M HOLLOWAY
Master Sergeant, USMC
Legal Services Chief
OSJA MCRSC

e. What is your Domicile (Your legal RESIDENCE)?

(CITY) (STATE)

(1) In which State are you registered to vote? _____

(2) In which State do you pay income taxes? _____

(3) In which State are you licensed to drive? _____

(4) Do you own real estate property? ,,,Yes ,,,No (If YES, where is it located?)

(STREET ADDRESS) (CITY) (STATE)

2. **NAME OF SPOUSE:** _____
FIRST MIDDLE LAST

LEGAL RESIDENCE: _____
CITY STATE

3. **DO YOU HAVE ANY CHILDREN?** Yes_____ No_____

a. Number of children.

b. Do you have any children from your present marriage? Yes _____ No_____ Number_____

c. Do you have any children from a former marriage? Yes _____ No_____ Number_____

d. Do you have any adopted children? Yes _____ No_____ Number _____

e. Do you have any step-children? Yes _____ No_____ Number _____

f. List <u>Full Name</u>	<u>Age</u>	<u>Relationship</u> of your children (son, daughter, step/adopted-son)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Do you want step children or adopted children treated equally with your natural children? Yes_____ No_____

4. Do you desire to make any **SPECIFIC BEQUESTS**? If so, state what you want to give, i.e., jewelry, etc. and to whom?

(ONLY LIST TANGIBLE PERSONAL ITEMS)

NO _____

5. **PRIMARY EXECUTOR/EXECUTRIX** (Individual that will administer your will and estate and take your will through the probate court system) (Normally your spouse if you are married).

a. Do you want your **SPOUSE** to be your Primary Executor? Yes _____ No _____

b. If you are not married or do not want your spouse to be your Primary Executor who do you want to be your Primary Executor?

RELATIONSHIP TO YOU: _____ **COEXECUTOR** 5a or 5b **and** 6 _____

NAME: _____ **FIRST** 5a or 5b **THEN** 6 _____
FIRST MIDDLE LAST

LEGAL RESIDENCE: _____
CITY STATE

6. **ALTERNATE EXECUTOR/EXECUTRIX** (If your Primary is unable or unwilling to perform designated duties).

RELATIONSHIP TO YOU: _____

NAME: _____
FIRST MIDDLE LAST

LEGAL RESIDENCE: _____
CITY STATE

7. **ALTERNATE GUARDIAN OR GUARDIAN(S)** (Note: First Guardian is nearly always the surviving natural parent - **DON'T NAME YOUR CHILD'S OTHER PARENT AS ALTERNATE GUARDIAN**).

a. RELATIONSHIP TO YOU: _____ **CO-GUARDIAN:** A & B _____

NAME: _____ 2ND ALT.: FIRST A THEN B _____
FIRST MIDDLE LAST

LEGAL RESIDENCE: _____
CITY STATE

b. RELATIONSHIP TO YOU: _____

NAME: _____
FIRST MIDDLE LAST

LEGAL RESIDENCE: _____
CITY STATE

8. **PRIMARY BENEFICIARY** (person you want to receive **all** of your estate, normally your spouse if married or your children if you are not married).

- a. Do you want your **SPOUSE** to be you primary beneficiary? Yes No
- b. Do you want your property to go to your **children** if your spouse predeceases you? Yes No
 - (1) At what age do you wish to have your estate distributed to your children?
 18 21 Other (Specify _____)
 - (2) Do you want to give your estate to your children IN TRUST? Yes No
If so, do you want the trust managed by the executor you have named? Yes No

If "NO", who do you want to name as TRUSTEE?

RELATIONSHIP TO YOU: _____

NAME: _____
FIRST MIDDLE LAST

LEGAL RESIDENCE: _____
CITY STATE

- c. For your **grandchildren**, (if your child(ren) predecease you) should your estate pass

Per STIRPES _____ (inherit parents estate) OR Per CAPITA _____ (your children & grandchildren share equally).

GO TO #9 if you answered 8a, b, and c above.

- d. If you are **not** married and have **no** children, **who do you want** to be your primary beneficiary?

RELATIONSHIP TO YOU: _____

NAME: _____
FIRST MIDDLE LAST

LEGAL RESIDENCE: _____
CITY STATE

9. **ALTERNATE BENEFICIARY** - If your primary beneficiary predecease you, then **indicate below who or what person or legal entity is to receive your estate**). Remember you can give to more than one person or legal entity (in shares). Use additional paper if you have more persons or legal entities to list. **DO NOT LIST SPOUSE OR CHILDREN HERE**

- a. RELATIONSHIP TO YOU: _____ SHARE EQUALLY
SHARE UNEQUALLY
LIST PERCENTAGE BY NAME
- NAME: _____
FIRST MIDDLE LAST FIRST A THEN B

LEGAL RESIDENCE: _____
CITY STATE

b. RELATIONSHIP TO YOU: _____

NAME: _____
FIRST MIDDLE LAST
USE SEPARATE SHEET IF MORE SPACE IS NEEDED. ADDITIONAL PAGE ATTACHED? YES ,, NO ,,

LEGAL RESIDENCE: _____
CITY STATE

10. **DEPENDENTS ONLY**, HAVE YOU EVER SERVED IN THE UNITED STATES ARMED FORCES?
___ Yes ,,,No

11. **DO WANT TO DISINHERIT ANY ONE?** ,,,YES ,,,NO

RELATIONSHIP TO YOU: _____

NAME: _____
FIRST MIDDLE LAST

LEGAL RESIDENCE: _____
CITY STATE

12. **BURIAL INSTRUCTIONS:**

- a. DO YOU WANT YOUR BODY TO BE CREMATED? ,,,YES ,,, NO
- b. DO YOU WANT TO BE BURIED WITH YOUR SPOUSE? ,,, YES ,,, NO
- c. DO YOU WANT A MILITARY BURIAL (CEREMONY)? ,,, YES ,,, NO
- d. DO YOU WISH TO BE BURIED IN A SPECIFIC LOCATION? ,,, YES ,,, NO

If yes, please specify location: _____

**THE FOLLOWING ARE DOCUMENTS ARE A PART OF YOUR WILL
PLEASE CHECK YOUR CHOICE IN THE FOLLOWING QUESTIONS**

12. **DECLARATION OF NATURAL DEATH/LIVING WILL** (THIS IS A DOCUMENT THAT IS NOT INCLUDED IN YOUR WILL) If you do **not** want to be kept alive on some type of life support, if you are considered terminally ill, then **you need** the Declaration of Natural Death/Living Will? CHECK YES IF YOU WANT THE DOCUMENT. ,,,YES ,,, NO

13. **DO YOU WANT A MEDICAL POWER OF ATTORNEY?** ,,, YES ,,, NO

(A MEDICAL POWER OF ATTORNEY allows you to appoint an agent to make medical decisions for you, including decisions regarding a last illness, should you become incapacitated. THIS IS A DOCUMENT THAT IS NOT INCLUDED IN YOUR WILL)

a. RELATIONSHIP TO YOU: _____ JOINT ATTORNEY-IN-FACT A & B
NAME: _____ 2ND ALTERNATE: FIRST A THEN B
FIRST MIDDLE LAST EITHER CAN ACT SEPARATELY

STREET ADDRESS: _____

_____ CITY STATE

TEL #. _____

b. RELATIONSHIP TO YOU: _____

NAME: _____
FIRST MIDDLE LAST

STREET ADDRESS: _____

_____ CITY STATE

TEL #. _____

Please check if you would like to express a preference:

a. DO YOU WANT YOUR REMAINS DONATED TO SCIENCE? ,,, YES ,,, NO

b. ARE YOU AN ORGAN DONOR? ,,, YES ,,, NO

c. WOULD YOU PREFER TO DIE AT HOME, RATHER THAN IN A HOSPITAL? ,,, YES ,,, NO

15. DO YOU WANT A DURABLE POWER OF ATTORNEY? YES NO

(A DURABLE POWER OF ATTORNEY is a document that allows you to appoint an agent to handle all of your financial affairs.)

a. RELATIONSHIP TO YOU: _____ **JOINT ATTORNEY-IN-FACT A & B**

NAME: _____ 2ND ALTERNATE: FIRST A THEN B
FIRST MIDDLE LAST

STREET ADDRESS: _____

_____ CITY STATE

TEL #. _____

b. RELATIONSHIP TO YOU: _____

NAME: _____
FIRST MIDDLE LAST

STREET ADDRESS: _____

_____ CITY STATE

TEL #. _____

c. In what circumstances is (are) your agent(s) authorized to act:

,,, Only when I am incapacitated ,,, At all times, regardless of my physical/mental condition

LEGAL ASSISTANCE CASE RECORD

Privacy Act Statement: Legal Assistance clients are asked to complete this form. Disclosure is voluntary. The information you provide will be used to assign your case to a legal assistance officer, to monitor the progress of your case, and to prepare reports on the office caseload. Disclosure outside the legal assistance office of any information you provide may be made only if you consent. The authority for soliciting and maintaining this information is 5 U.S.C. ? 301 and 44 U.S.C. ? 3101 (E.O. 9697).

Signature

Date

?

Name: _____ SSN: _____ Rank: _____ Status: AD DEP RET

Spouse's Name: _____ SSN: _____ Rank: _____ Status: AD DEP RET

Local Address: _____

Unit/Section: _____ Home Phone: _____ Work Phone: _____

Have you discussed this matter with another attorney? YES NO If yes, who? _____

Has your spouse or the other party involved in this matter been seen by an attorney in this office? YES NO

If yes, which attorney? _____

Reason for today's appointment: _____

OFFICE USE ONLY

Appointment made by: _____ Attorney: _____

Initial Appointment: _____ Follow-up Appointments: _____

Conflict check date: _____

- | | |
|--|--|
| <p>___ B1 PLA Briefs to Units</p> <p>___ B2 PLA Publications</p> <p>___ C1 Debtor/Creditor Matters</p> <p>___ C2 Sales Contract Matters</p> <p>___ C3 Repair Work Disputes</p> <p>___ D1 Divorce/Sep/Child Support</p> <p>___ D3 Adoption/Name Change Assist</p> <p>___ D4 Nonsupport/Paternity Matters</p> <p>___ I1 Immigr/Naturalization/Citizen</p> <p>___ L1 Landlord/Tenant Advice</p> <p>___ L2 Lease Advice/Preparation</p> <p>___ M1 Military Rights & Benefits</p> <p>___ N1 Notarizations</p> | <p>___ N2 Non-Att Admin/Advice Svc</p> <p>___ O1 Other Matters</p> <p>___ P1 Powers of Attorney</p> <p>___ R1 Real Property Advice</p> <p>___ R2 Real Prop. Document Prep</p> <p>___ T1 General Tax Advice</p> <p>___ T2 Tax Return Preparation</p> <p>___ V1 Racial Harassment/Discr</p> <p>___ V2 Sexual Harassment/Discr</p> <p>___ V3 Soldiers & Sail CRA Matt</p> <p>___ W1 Simple Will</p> <p>___ W2 Estate Planning Services</p> <p>___ X1 Civilian Crim Law Asst</p> |
|--|--|

EXECUTOR'S CHECKLIST

Stage 1 -- Pre-Probate Tasks

1. Provide physician with accurate information for death certificate - request at least 6 from funeral director or state bureau of vital statistics.
2. Arrange for security at homes of decedent and close relatives.
3. Meet with decedent's family/heirs; offer assistance, information; obtain psychotherapeutic aid if needed.
4. Discuss and make decisions on donation of body organs with close family members.
5. Ascertain who has right to make funeral arrangements; render assistance (notify clergy if not already informed).
6. Obtain deed to cemetery plot.
7. Help family prepare obituary.
8. Provide care for minors/family members unable to care for themselves.
9. Provide immediate care/security for plants/pets/business and personal assets (especially perishables) and documents.
10. Determine cash needs of immediate survivors and adequacy and sources of cash to meet demands.
11. Tell all friends and family members to give you receipts for funeral-related expenditures.
12. Arrange for decedent's mail to be held at post office until your formal appointment; then arrange for forwarding. Stop newspapers and other deliveries if appropriate.
13. Notify bank - if named as executor or trustee - of death and request immediate appointment of administration officer.

Stage 2 -- Obtaining "Letters"

1. Locate and examine will.* Advise spouse of right to obtain own attorney and elect against will.
2. Select and meet with attorney to represent estate.
3. Estimate decedent's assets/liabilities.
4. Prepare petition for "letters" (out-of-state property may require ancillary administration as well).
5. Probate will at Register of Wills office and order "short certificates."
6. If necessary, arrange for bond with surety. Ascertain if special procedure for small estates is available and/or if estate can be settled by family agreements.

Stage 3 -- Assembling and Converting Assets

1. Call property casualty insurance agent(s) and have all coverage checked for adequacy. Obtain confirmation in writing.
2. Call life insurance agent:
 - (a) Have health and life insurance on survivors reviewed;
 - (b) Request claim forms for proceeds on decedent's life (request IRS Form 712) and health/accident claims.
3. Contact bank for opening of safe-deposit box. Open new box for estate.
4. Redraft wills of survivors.
5. List all assets/liabilities. Examine checks, tax returns, insurance policies.

6. Locate and take control of all decedent's property.
7. Arrange for appraisal of personal property.
8. Arrange for appraisal of real estate.
9. Sell or dispose of all perishables.
10. Analyze and review securities. Put idle funds into money markets or CDs.
11. Notify Social Security/V.A. and county and begin to process forms for obtaining benefits.
12. Contact employer and request unpaid salary/bonus/vacation pay/pensions/other death-related benefits.
13. Advertise grant of letters.
14. Notify local banks of decedent's death. Request information on account/safe-deposit box.
15. Transfer all cash to new checking account in the estate's name. Set up accounting and control system and apply for employer identification number from IRS.
16. Obtain all stocks/bonds. Close brokerage accounts. Collect any interest/dividends. Sell securities to extent necessary/appropriate. Place balance in name of executor.
17. Inspect all real estate. Arrange for security, management/payment of taxes, collection of rents.
18. Put all jewelry/furs/art/ other valuable personal effects into safe-deposit box or similar protected storage.
19. Proceed with, adjust and settle claims/lawsuits.
20. Check will/letter of instructions and consult decedent's heirs and attorney with respect to business continuation. Arrange for immediate supervision and management. Decide on sale/liquidation/continuance.

Stage 4 -- Filing and Payments of Taxes, Debts, and Expenses

1. Request family exemption from state death tax if appropriate. Obtain exemption certificates for charitable gifts.
2. File state and federal income tax returns for (a) period before death and (b) period after death.
3. File federal estate tax return if necessary and pay tax due.
4. File state death tax return(s) (including other states) and pay tax due.
5. Pay personal or real property taxes due.
6. Pay bills, loans, etc.
7. Pay appraiser's, accountant's, lawyer's, personal representative's fees and court costs.

Stage 5 -- Distribution

1. Prepare and file accounting of receipts/disbursements/schedule of distribution.
2. Notify unpaid creditors and beneficiaries of filing of account and time and date of audit.
3. Notify attorney general of state if charitable gifts are involved.
4. Establish testamentary trusts.
5. Transfer securities and other assets in accordance with court-approved distribution schedule (obtain receipt and release).
6. Petition for surety's discharge.

LETTER OF GUIDANCE FOR MY EXECUTOR

In The Event of My Death

1. The original of my last will and testament dated _____ and related documents are located:

- a. Place _____
- b. Street _____
- c. City, State, Zip _____
- d. Telephone _____

2. My desires for my funeral and burial are as follows:

3. Please notify of my death the person and organizations whose names, addresses, and telephone numbers are listed below or on attached sheets:

<u>NAME</u>	<u>ADDRESS</u>	<u>TELEPHONE</u>

4. Here is a list of my property and debts, including bank and other financial account numbers and real estate deed book numbers:

<u>Type of Accounts (Checking & Savings)</u>	<u>Account Number</u>	<u>Location</u>

Name of Account
(Credit Cards)

Account Number

Location

Type of Policy
(Life, Auto, Fire,
Home Owners, Renters)

Company

Policy
Number

Location

Location of Property

Location of Deed

Date: _____ Signature: _____

Print Name: _____

(Send a copy of this letter to your executor and alternate executor.)