

INFORMATION FOR WILLS

Your appointment is scheduled on _____ / ____ / ____ at _____ a.m./p.m. at our Akron/Batavia/Clarence/West Seneca/Buffalo office with Robert Friedman/ Michael H. Ranzenhofer.

1. Name: _____ Spouse Name: _____
Street Address: _____
City, County, State & Zip Code: _____
Home Phone No. _____ Business Phone No. _____ Fax No. _____
Cell Phone/Pager No. _____ Email: _____
DOB: _____ Social Security Number: _____
Occupation/Employer: _____
Spouse's Occupation/Employer: _____
Spouse's DOB: _____ Spouse's Social Security Number: _____
Citizenship: _____ Referred By: _____

2. All relatives who would share in your property if you had no Will (e.g. children, parents or siblings):

<u>Name</u>	<u>Address</u>	<u>Date of Birth</u>	<u>Relationship</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

3. Any prior marriages for you or your spouse? _____

4. Names of step-children: _____

5. Do you have a safe deposit box? _____ If so, where? _____

6. Do you have a: Living Will? _____ Health Care Proxy? _____
 Power of Attorney? _____ Living Trust? _____

7. Which of the above items would you like us to prepare? _____

8. Date and location of old Will: _____

OVER

9. Who do you want to act as Guardian or Trustee of your children?

Name/Address/Relationship: _____

10. Who do you want to act as Executor and Alternate Executor?

Name/Address/Relationship: _____

11. List all life insurance policies:

<u>Company</u>	<u>Type</u>	<u>Face Value/Cash Value</u>	<u>Beneficiary</u> <u>1st and 2nd</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

12. List bank accounts, CDs and money market funds (individual and joint):

<u>Bank/Institution</u>	<u>Type of Account</u>	<u>Approx. Bal.</u>	<u>Name of Owners</u>
_____	_____	_____	_____
_____	_____	_____	_____

13. List all real estate (individual and joint):

<u>Brief Description</u>	<u>Value</u>	<u>Mortgage Balance</u>	<u>Name of Owners</u>
_____	_____	_____	_____
_____	_____	_____	_____

14. List all retirement plans, IRAs, 401-Ks, etc.: _____

15. Stocks, bonds, mutual funds and annuities (individual and joint):

<u>No. of Shares</u>	<u>Class</u>	<u>Company</u>	<u>Value</u>	<u>Name of Owners</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

16. List any other property you own or in which you have an interest, including business interests, notes or mortgages owed to you, autos, boats, valuable jewelry, art work, etc.

17. Do you reasonably expect to inherit any property or receive any substantial gifts or powers of appointment? _____. If so, explain briefly: _____

18. Would you like us to hold your original will in safekeeping? _____

19. Who do you want to leave your estate to? _____

20. Are you or any of your beneficiaries disabled? _____