



We The People®

DOCUMENT PREPARATION SERVICES

WILL WORKBOOK - NEW YORK

This is a worksheet that will assist WE THE PEOPLE in preparing your **Will**.

If you have any questions, refer to the Will Overview.

If you are unsure about any aspect of your estate or who you want to inherit your estate, you should seek competent, independent legal advice from an attorney.

EXTRA TYPING FEE \$49.00 PER PAGE FOR ADDITIONAL PAGES up to 250 words each page.
Attach separate pages if you need more pages.

TERMINOLOGY USED IN THIS WORKBOOK AND IN YOUR WILL:

YOUR BENEFICIARY(IES): Your BENEFICIARY(IES) is the person or persons you are leaving your estate to when you die. You can pick ALTERNATE BENEFICIARIES if your BENEFICIARIES die before you do. A Beneficiary can be an Executor as well.

DISINHERITING (Optional): Is there any relative you specifically DO NOT WANT to receive anything from your estate when you die?

SPECIAL GIFTS (Optional): You can choose to leave your beneficiaries Special Gifts after you die. The Special Gifts are distributed from your estate first, and then the remainder of your estate is distributed to your beneficiaries as you direct. You can list any individuals or organizations that you wish to receive gifts from your estate after you die. [for example: house, land, jewelry, money, antiques, cars, pets, dolls, baseball cards etc.]

THE EXECUTOR OF YOUR ESTATE: Your EXECUTOR is the person or persons who will serve as your personal representative and the person or persons who will distribute your estate according to your wishes after you die. You can pick an ALTERNATE EXECUTOR if your EXECUTOR is unwilling or unable to serve as your personal representative. Your Executor can be one of your Beneficiaries.

THE GUARDIAN OF YOUR MINOR CHILDREN UNDER THE AGE OF 18: applies ONLY if you have children under the age of 18. Your GUARDIAN is the person or people who you want to raise your minor children if you and your spouse die. You can pick an ALTERNATE GUARDIAN if your GUARDIAN is unwilling or unable to serve as GUARDIAN for your children under the age of 18.

THE CUSTODIAN OF ANY BENEFICIARY(IES) UNDER THE AGE OF 21: applies ONLY if you have beneficiaries under the age of 21. If any of your beneficiaries are under the age of 21 at the time of your death, you will name an adult over the age of 21 who will be the CUSTODIAN of the Beneficiary(ies) share of the estate. This is the person who will manage your Beneficiaries' inheritances.

PLEASE PRINT YOUR NAME HERE: _____

WILL WORKBOOK- NEW YORK

Your Name _____ Male Female

Address: _____

City: _____ State: _____ Zip: _____

Phone () _____

MARITAL STATUS:

SINGLE - NEVER MARRIED

DIVORCED

WIDOWED

MARRIED - I am currently married to: (NAME OF SPOUSE:) _____

☞ IF YOU ARE MARRIED ANSWER THE QUESTIONS BELOW:

1. ARE YOU DISINHERITING YOU SPOUSE? YES OR NO

☞ IF YES, SKIP to the next page!

☞ IF NO, answer the following question:

2. DO YOU WANT YOUR SPOUSE TO INHERIT YOUR ESTATE UPON YOUR DEATH?

YES (my beneficiaries I choose will inherit my estate *only* if my spouse dies before me)

OR

NO (my beneficiaries I choose will inherit my estate)

YOUR CHILDREN (EITHER BORN OR ADOPTED):

CHILD #1 NAME	RELATIONSHIP	DISINHERIT?	AGE
		<input type="checkbox"/> YES <i>OR</i> <input type="checkbox"/> NO	

IF CHILD #1 IS UNDER AGE 18, I NOMINATE THE FOLLOWING PERSON(S) TO ACT AS GUARDIAN:*(
 (*If you chose more than 1 guardian they will act as co-guardians)

GUARDIAN #1: _____

GUARDIAN #2: _____

IF THE GUARDIAN(S) I SELECTED ABOVE ARE UNABLE OR UNWILLING TO ACT, I NOMINATE THE
 FOLLOWING INDIVIDUAL(S) AS ALTERNATE GUARDIAN(S) FOR MY CHILD:

ALTERNATE GUARDIAN #1: _____

ALTERNATE GUARDIAN #2: _____

CHILD #2 NAME	RELATIONSHIP	DISINHERIT?	AGE
		<input type="checkbox"/> YES <i>OR</i> <input type="checkbox"/> NO	

IF CHILD #2 IS UNDER AGE 18, I NOMINATE THE FOLLOWING PERSON(S) TO ACT AS GUARDIAN:*(
 (*If you chose more than 1 guardian they will act as co-guardians)

GUARDIAN #1: _____

GUARDIAN #2: _____

IF THE GUARDIAN(S) I SELECTED ABOVE ARE UNABLE OR UNWILLING TO ACT, I NOMINATE THE
 FOLLOWING INDIVIDUAL(S) AS ALTERNATE GUARDIAN(S) FOR MY CHILD:

ALTERNATE GUARDIAN #1: _____

ALTERNATE GUARDIAN #2: _____

YOUR CHILDREN (EITHER BORN OR ADOPTED):

CHILD #3 NAME	RELATIONSHIP	DISINHERIT?	AGE
		<input type="checkbox"/> YES <i>OR</i> <input type="checkbox"/> NO	

IF CHILD #3 IS UNDER AGE 18, I NOMINATE THE FOLLOWING PERSON(S) TO ACT AS GUARDIAN:*(
 (*If you chose more than 1 guardian they will act as co-guardians)

GUARDIAN #1: _____

GUARDIAN #2: _____

IF THE GUARDIAN(S) I SELECTED ABOVE ARE UNABLE OR UNWILLING TO ACT, I NOMINATE THE
 FOLLOWING INDIVIDUAL(S) AS ALTERNATE GUARDIAN(S) FOR MY CHILD:

ALTERNATE GUARDIAN #1: _____

ALTERNATE GUARDIAN #2: _____

CHILD #4 NAME	RELATIONSHIP	DISINHERIT?	AGE
		<input type="checkbox"/> YES <i>OR</i> <input type="checkbox"/> NO	

IF CHILD #4 IS UNDER AGE 18, I NOMINATE THE FOLLOWING PERSON(S) TO ACT AS GUARDIAN:*(
 (*If you chose more than 1 guardian they will act as co-guardians)

GUARDIAN #1: _____

GUARDIAN #2: _____

IF THE GUARDIAN(S) I SELECTED ABOVE ARE UNABLE OR UNWILLING TO ACT, I NOMINATE THE
 FOLLOWING INDIVIDUAL(S) AS ALTERNATE GUARDIAN(S) FOR MY CHILD:

ALTERNATE GUARDIAN #1: _____

ALTERNATE GUARDIAN #2: _____

DISINHERITING (Optional):

Is there any relative you specifically DO NOT WANT to receive anything from your estate when you die?

(Attach separate pages if you have more disinherited persons than will fit on this page. Additional typing fees will apply.)

NAME OF DISINHERITED PERSON(S)	RELATIONSHIP

SPECIAL GIFTS (Optional):

List here any individuals or organizations that you wish to receive gifts from your estate after you die.
[for example: house, land, jewelry, money, antiques, cars, pets, dolls, baseball cards etc.]

Attach separate pages if you have more than 5 gifts.

(There is an extra typing fee of \$29.00 for every 5 additional gifts that exceed the first 5).

GIFT #1

I LEAVE THE FOLLOWING GIFT: _____

TO: (RECIPIENT NAME) _____

RECIPIENT RELATIONSHIP: _____

GIFT #2

I LEAVE THE FOLLOWING GIFT: _____

TO: (RECIPIENT NAME) _____

RECIPIENT RELATIONSHIP: _____

GIFT #3

I LEAVE THE FOLLOWING GIFT: _____

TO: (RECIPIENT NAME) _____

RECIPIENT RELATIONSHIP: _____

GIFT #4

I LEAVE THE FOLLOWING GIFT: _____

TO: (RECIPIENT NAME) _____

RECIPIENT RELATIONSHIP: _____

GIFT #5

I LEAVE THE FOLLOWING GIFT: _____

TO: (RECIPIENT NAME) _____

RECIPIENT RELATIONSHIP: _____

NAMES OF YOUR BENEFICIARY(IES): Your **BENEFICIARY(IES)** - the person or persons you are leaving your estate to when you die.

* On page 1 of 12 in this workbook, if you chose your spouse to inherit your estate when you die, the beneficiaries listed below will inherit your estate only if your spouse dies before you.

* If you did not disinherit your spouse, you may list your spouse below.

Attach separate pages if you have more than 5 BENEFICIARIES.

There is an extra typing fee of \$29.00 for every 5 additional beneficiaries that exceed the first 5.

CHECK THIS BOX IF ALL YOUR BENEFICIARIES ARE TO HAVE EQUAL SHARES

NAME OF BENEFICIARY #1	RELATIONSHIP	% SHARE*	AGE

* (If you chose equal shares please leave this box blank)

IF BENEFICIARY #1 IS YOUNGER THAN AGE 21, I NOMINATE THE FOLLOWING PERSON(S) TO ACT AS CUSTODIAN(S) FOR BENEFICIARY #1.

(The custodian is the person(s) who will manage Beneficiary #1's inheritances until age 21)

CUSTODIAN #1: _____

CUSTODIAN #2: _____

IF BENEFICIARY #1 DIES BEFORE ME:

I want Beneficiary #1's share of my estate to be divided equally between the surviving beneficiaries.

OR

I want Beneficiary #1's share of my estate to go to the following person(s):

NAME: _____

NAME: _____

NAME: _____

NAME OF BENEFICIARY #2	RELATIONSHIP	% SHARE*	AGE

* (If you chose equal shares please leave this box blank)

IF BENEFICIARY #2 IS YOUNGER THAN AGE 21, I NOMINATE THE FOLLOWING PERSON(S) TO ACT AS CUSTODIAN(S) FOR BENEFICIARY #2.

(The custodian is the person(s) who will manage Beneficiary #2's inheritances until age 21)

CUSTODIAN #2: _____

CUSTODIAN #2: _____

IF BENEFICIARY #2 DIES BEFORE ME:

I want Beneficiary #2's share of my estate to be divided equally between the surviving beneficiaries.

OR

I want Beneficiary #2's share of my estate to go to the following person(s):

NAME: _____

NAME: _____

NAME: _____

NAME OF BENEFICIARY #3	RELATIONSHIP	% SHARE*	AGE

* (If you chose equal shares please leave this box blank)

IF BENEFICIARY #3 IS YOUNGER THAN AGE 21, I NOMINATE THE FOLLOWING PERSON(S) TO ACT AS CUSTODIAN(S) FOR BENEFICIARY #3.

(The custodian is the person(s) who will manage Beneficiary #3's inheritances until age 21)

CUSTODIAN #3: _____

CUSTODIAN #3: _____

IF BENEFICIARY #3 DIES BEFORE ME:

I want Beneficiary #3's share of my estate to be divided equally between the surviving beneficiaries.

OR

I want Beneficiary #3's share of my estate to go to the following person(s):

NAME: _____

NAME: _____

NAME: _____

NAME OF BENEFICIARY #4	RELATIONSHIP	% SHARE*	AGE

* (If you chose equal shares please leave this box blank)

IF BENEFICIARY #4 IS YOUNGER THAN AGE 21, I NOMINATE THE FOLLOWING PERSON(S) TO ACT AS CUSTODIAN(S) FOR BENEFICIARY #4.

(The custodian is the person(s) who will manage Beneficiary #4's inheritances until age 21)

CUSTODIAN #4: _____

CUSTODIAN #4: _____

IF BENEFICIARY #4 DIES BEFORE ME:

I want Beneficiary #4's share of my estate to be divided equally between the surviving beneficiaries.

OR

I want Beneficiary #4's share of my estate to go to the following person(s):

NAME: _____

NAME: _____

NAME: _____

NAME OF BENEFICIARY #5	RELATIONSHIP	% SHARE*	AGE

* (If you chose equal shares please leave this box blank)

IF BENEFICIARY #5 IS YOUNGER THAN AGE 21, I NOMINATE THE FOLLOWING PERSON(S) TO ACT AS CUSTODIAN(S) FOR BENEFICIARY #5.

(The custodian is the person(s) who will manage Beneficiary #5's inheritances until age 21)

CUSTODIAN #5: _____

CUSTODIAN #5: _____

IF BENEFICIARY #5 DIES BEFORE ME:

I want Beneficiary #5's share of my estate to be divided equally between the surviving beneficiaries.

OR

I want Beneficiary #5's share of my estate to go to the following person(s):

NAME: _____

NAME: _____

NAME: _____

ATTACH SEPARATE PAGES IF YOU HAVE MORE THAN 5 BENEFICIARIES

THE EXECUTOR OF YOUR ESTATE

Your **EXECUTOR** is the person or persons who will serve as your personal representative(s) and the person or persons who will distribute your estate according to your wishes after you die.

(Your Executor(s) can also be Beneficiaries.)

(If you name more than one Executor, these people shall act as Co-Executors.)

NAME OF EXECUTOR(s)

1.

2.

3.

(Optional) ALTERNATE EXECUTOR

You may choose **ALTERNATE EXECUTORS** if the person(s) you picked as your EXECUTOR above is/are unable or unwilling to act as your personal representative(s).

(Your Alternate Executor(s) can also be Beneficiaries.)

NAME OF ALTERNATE EXECUTOR(s)

1.

2.

3.

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