

**LAW OFFICE OF CONRAD WILLKOMM, P.A.**

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**MARRIED PRELIMINARY INFORMATION**

Husband's Last Name: _____	Wife's Last Name: _____
Husband's First Name: _____	Wife's First Name: _____
Middle: _____ JR., SR. II, III, IV?	Middle: _____ JR., SR. II, III, IV?
I prefer to be called: _____	I prefer to be called: _____
Date of Birth: _____	Date of Birth: _____
Occupation: _____	Occupation: _____
Home Address: _____	
Home City: _____	Home State: _____ Home Zip: _____
County of Residence: _____	Home Phone: _____
Husband's Cell: _____	Wife's Cell: _____
E-Mail Address: _____	

**CHILDREN**

	(Phone #)	(Gender)	(Date of Birth)	(# of Children)
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____

*If you have additional children, please give the above information on a separate sheet of paper.*

Is this your first marriage?  Yes  No

Are there any children from a prior relationship?  Yes  No

If yes, please indicate who is the parent of each: \_\_\_\_\_

Is it possible for either Husband or Wife to have or adopt more children?  Yes  No

Do any of the children have mental or health related impairments/disabilities?  Yes  No

If so, please describe: \_\_\_\_\_

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Are you concerned with any of your children wasting their inheritance?  Yes  No

Are you concerned about the spouse of your children receiving any of their inheritance?  Yes  No

Do you have any specific topics that you would like to discuss at your appointment?  Yes  No

If so, please describe: \_\_\_\_\_

*Please note, it is our office policy to not release drafts of Estate Planning documents prior to the date of signing.*

**APPROXIMATE ASSET VALUE INFORMATION \$**

Life Insurance on Husband	\$ _____	Life Insurance on Wife	\$ _____
Husband's IRAs, 401(k)'s, etc.	\$ _____	Wife's IRAs, 401(k)'s, etc.	\$ _____
Stocks, Bonds, Mutual Funds	\$ _____	Cash, CD's Savings, Checking	\$ _____
Notes Where People Owe You Money	\$ _____	Business Interests	\$ _____
Cars, Jewelry, Furniture, etc.	\$ _____	Expected Inheritance	\$ _____
Value of Residence	\$ _____	Other Real Estate	\$ _____

Is there a Mortgage on a property that you own?  Yes  No

If yes, please provide the amount of the outstanding balance(s):

\$ \_\_\_\_\_ Approximate total estate value: \$ \_\_\_\_\_

**DISPOSITION OF PROPERTY** *Fill out only if someone other than your spouse or child will receive a portion of your estate.*

Name(s)	Relationship
1. _____	_____
2. _____	_____
3. _____	_____

Upon your death, briefly describe how you would like your estate to pass:

\_\_\_\_\_

Would you like to discuss a community property trust which may allow for a full step up in basis after the first spouses death:  Yes  No

Whom do you want to name as the **PERSONAL REPRESENTATIVE\*/TRUSTEE** of your estate? Spouses normally name each other first. *\*Named Personal Representative(s) must either be a relative or Florida resident to qualify.*

**HUSBAND**

Name(s)	Relationship
1. _____	_____
2. _____	_____
3. _____	_____

**WIFE**

Name(s)	Relationship
1. _____	_____
2. _____	_____
3. _____	_____

Whom do you want to name as **GUARDIAN(S)\*** of your children (if applicable)? *\*Married couples can serve together*

Name(s)	Relationship
1. _____	_____
2. _____	_____
3. _____	_____

Please note that original Wills are required for probate and safety deposit boxes are difficult to access after death. We can keep the originals in our fire safe for no additional fee. Would you like us to hold your original Will and Trust?  Yes  No

**POWER OF ATTORNEY**

Whom do you want to name as an agent on your durable power of attorney? Spouses normally name each other first. This gives the person or persons you name the power to sign your name. For instance, it can be used to sign a check or a tax return.

**HUSBAND**

**WIFE**

- 1. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_
- 2. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_
- 3. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_

- 1. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_
- 2. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_
- 3. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_

Would you like superpowers included on your durable power of attorney authorizing your agent to plan for Medicaid and/or disability of a beneficiary for an additional \$100? (This gives your agent broad discretion to give away your assets or change beneficiaries.)  Yes  No

**HEALTH CARE SURROGATE**

Whom do you want to name as an agent on your health care surrogate? This document allows you to appoint a person or persons to make medical decisions on your behalf should you become incapacitated.

**HUSBAND**

**WIFE**

- 1. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_
- 2. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_
- 3. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_

- 1. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_
- 2. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_
- 3. \_\_\_\_\_  
Phone: \_\_\_\_\_  
Relationship: \_\_\_\_\_

Would you like to have a Living Will incorporated into your Health Care Surrogate?  Yes  No (This is a document where you declare that you would like life support withheld, if you have no medical chance of recovery.)

Would you like laminated Health Care Surrogate wallet cards for \$75 (includes 2 for each spouse)?  Yes  No

Please note one copy of your estate plan is included, would you like ADDITIONAL COPIES? If yes, please complete below:

- Yes, please provide me with \_\_\_\_\_ additional copies for \$10 per copy.
- Yes, please provide me with a flash drive containing a digital copy of my documents for \$25.
- Yes, please provide me with a digital copy of my documents via email for \$25.

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LAW OFFICE  
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**Conflict Waiver**

You are both clients of Law Office of Conrad Willkomm P.A. and as long as your interests are not in conflict, we may ethically continue to represent both of you. If any conflict which could affect your estate planning does arise, you have an obligation to advise us. In addition, you agree that there will be a complete and free disclosure and exchange of all information given to us during this representation. Matters that one of you might discuss with us are not protected by the attorney/client privilege from disclosure to the other.

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Signature of Husband

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Signature of Wife

**ADDITIONAL SPACE FOR NOTES/QUESTIONS:**

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