

WILL INTERVIEW FACT SHEET

I. GENERAL

Name(s): _____ d/o/b _____ SS# _____
 _____ d/o/b _____ SS# _____

Other Names Used? _____

Mailing Address _____

Telephone: Home: _____ Work: _____

Residence For Will Form:

Town/City/Village: _____ County: _____

Marriage YES NO Date: _____ Location: _____

Prior Marriage(s) YES NO Whose and to whom? _____

How Terminated: _____

When Married/Terminated: _____

Where Married/Terminated: _____

CHILDREN/NEXT OF KIN (Adopted/Prior Marriage):

<u>Name</u>	<u>Address</u>	<u>d/o/b</u>	<u>Relationship</u>

Employment: _____

Military Service: _____

Miscellaneous Info.: _____

Notes/questions:

II. ASSETS

A. Real Property

Location	Title		Purchase Info.			Mortgage	Approximate Value
	Type	Name(s)	Date	Price	Liens		

B. Bank/Credit Union Accounts

Bank/Branch	Account Type	Account #	Name of Accountholder	Approximate Value

C. Stocks/Bonds/IRAs/Pensions (attach extra sheet if needed)

Company	Type	# of Shares	Account #	Name(s)	Approximate Value

CONTACT:
 Jonna M. Spilbor, Esq.
 Office (845) 454-2569 / Mobile (845) 238-8378
 Ladylaw812@aol.com
 www.scclaw.com
 www.jonnaspilbor.com

D. Insurance

Company	Type	Policy	Named Insured	Beneficiary	Amount

Notes/questions:

E. Miscellaneous (Valuable personal property/business interests, etc)

Description	Approximate Value

TOTALS

	Husband	Wife	Joint
Real Property			
Bank/CU Accounts			
Stocks, etc.			
Insurance			
Miscellaneous			

III. WILL

A. Specific Bequests (Personal/Institutional)

Name	Relationship	Description

CONTACT:
 Jonna M. Spilbor, Esq.
 Office (845) 454-2569 / Mobile (845) 238-8378
 Ladylaw812@aol.com
 www.scclaw.com
 www.jonnaspilbor.com

Name	Relationship	Description

B. Residuary Estate:

C. Effect of Predecease of Beneficiaries:

D. Trusts

Name	Relationship	Type

E. Executor/Executrix (Name, Address and Relationship)

F. Substitute Executor/Executrix (Name, Address and Relationship)

CONTACT:
 Jonna M. Spilbor, Esq.
 Office (845) 454-2569 / Mobile (845) 238-8378
 Ladylaw812@aol.com
 www.scclaw.com
 www.jonnaspilbor.com

G. Trustee(s) (Name, Address and Relationship)

H. Substitute Trustee(s) (Name, Address and Relationship)

I. Guardian for Minor Children (Person/Property) (Name, Address and Relationship)

J. Substitute Guardian for Minor Children (Person/Property) (Name, Address and Relationship)

K. Miscellaneous Information:

CONTACT:
Jonna M. Spilbor, Esq.
Office (845) 454-2569 / Mobile (845) 238-8378
Ladylaw812@aol.com
www.scclaw.com
www.jonnaspilbor.com