

Wills and trusts



You know, by now, that everybody has an estate and everybody needs to plan. But how much legal and financial help you need with your planning depends upon the monetary value and complexity of your estate. Once you have a will and, possibly, trust documents, make notes about them here.

Your will

Date of most current will or codicil: _____

Location of: _____

Personal representative: _____

Address: _____

Phone number: _____

Attorney: _____

Address: _____

Phone number: _____

Your husband's or wife's will

Date of most current will or codicil: _____

Location of: _____

Personal representative: _____

Address: _____

Phone number: _____

Attorney: _____

Address: _____

Phone number: _____