

FABIAN LAW FIRM

Cumming Office: Buckhead Office:
101 Pilgrim Village Drive 3630 Peachtree Road, NE
Suite 200 Suite 1025 – 10th Floor
Cumming, GA 30040 Atlanta, GA 30326
Tel. 678-513-1112
Fax 678-513-2938
cfabian@fabian-law-firm.com

Client Information Sheet - WILLS

Name: _____ Age: _____

Occupation: _____

Address: _____

City, State, Zip: _____

County: _____

Last four digits of SS# or Full Hyatt Membership Number (if applicable): _____

Referred By: _____

Legal Plan Case Number (if applicable): _____

Do you have existing Wills/Trusts?: _____

Contact Info.:

Cell - _____

Home - _____

Work - _____

Email - _____

Marital Status: _____

How long married (if applicable): _____

of Previous Marriages (if applicable): _____

Spouse (if applicable): _____ Age: _____

Occupation: _____

of Previous Marriages (if applicable): _____

Spouse Contact Info.:

Cell - _____

Home - _____

Work - _____

Email - _____

Children (if applicable) – Full names and ages:

1. _____

2. _____

3. _____

4. _____

An Executor is a person you appoint who is responsible for carrying out the legal and financial wishes stated in your Will including the payment of debts, sale of assets and distributions to beneficiaries. This person plays the same role as an administrator if you had died without a valid will.

Executor: _____

Address: _____

Phone: _____

Alternate Executor: _____

Address: _____

Phone: _____

A Trustee is a person or institution who is responsible for managing any property or assets an Executor transfers into and titles in the name of a Trust. The trustee has duties to be loyal, be prudent, be impartial, and to inform the beneficiaries of the trust. The trustee can be the Executor and/ or a Guardian of the children in a Testamentary Trust in addition to the trustee role.

Trustee (if applicable): _____

Address: _____

Phone: _____

Alternate Trustee: _____

Address: _____

Phone: _____

A Guardian is a person appointed by a parent who attends to the care of his or her minor children in the event of the parent's death. At minimum, this includes health and living affairs. Depending on whether a Trustee is appointed, this would also include financial affairs.

(If applicable) Guardian for minor (under 18) children:

Address: _____

Phone: _____

Alternate Guardian: _____

Address: _____

Phone: _____

Typically, the spouse is named as the beneficiary. If the spouse predeceases, the child(ren) are the beneficiary unless otherwise stated.

Real Estate located in GA:

1. _____

2. _____

3. _____

Real Estate located outside the state of GA:

1. _____

2. _____

3. _____

Any assets located outside of the United States? _____

Approximate net asset value (not including life insurance): _____

Breakdown: 401Ks: _____

IRAs: _____

Savings: _____

Investment Accts: _____

Real Estate: _____

Other: _____

Life Insurance Policies/Value:

1. _____

2. _____

3. _____

A Financial/Durable Power of Attorney is a person designated, called an agent or attorney-in-fact, to act on his or her behalf for financial decisions, such as in the case of being hospitalized and/or incapacitated. This power ends at death.

Person you want to designate to be your Financial Power of Attorney:

Primary: _____

Alternate: _____

Health Care Agent is a person designated, called an agent or attorney-in-fact, to act on his or her behalf with regard to specifically healthcare decisions. This power ends at death.

Person you want to designate to be your Health Care Agent:

Primary: _____

Alternate: _____