

## Personal Information

Full Name

Date of Birth

Phone Number

Email Address

Address

## Relationship Status

Status

## Children / Dependents

Do you have children or dependents?

If yes, please provide their names and ages

## Assets

Please list your significant assets (e.g., real estate, bank accounts, retirement accounts):

## Liabilities / Debts

Please list your significant debts (e.g., student loans, mortgages, credit cards):

## Executor/Guardian Choices

Who would you like to name as your executor?

If you have children, who would you like to appoint as guardian?

## Beneficiaries

Who would you like to name as primary beneficiaries?

Would you like to name contingent (secondary) beneficiaries?

## Additional Notes / Special Instructions