

CLIENT DATA SHEET - WILL

Name: _____ SS#: ____-____-____
(as you wish it to appear in your Will)

Address: _____ Kansas _____
Street/Box No. City Zip

Phone: (home) _____ (work) _____ Hyatt Auth. No. _____

Spouse's Name: _____ SS#: ____-____-____

Names of Children	Ages	Names of Children	Ages
_____	_____	_____	_____
_____	_____	_____	_____

Other than your spouse (if married), who do you nominate to serve as the executor of your estate?

First Choice: _____ Second Choice: _____

The laws of the State of Kansas permit a separate list of tangible personal property (for example: family heirlooms, jewelry, collections, photographs and even knickknacks of limited value) which is incorporated into your Will without the formalities of witnesses and notaries. Would you like to provide in your Will for the possibility of preparing such a list at a future date? Yes/No

Even if your answer to the preceding questions is "Yes", would you like to make specific bequests of money or property in your Will itself? Yes/No [If your answer is "Yes", list the specific bequests and the beneficiary of each bequest on the back of this sheet.]

If your answers to either of the preceding two questions is "Yes", would you like the list of property and/or specific bequests to be effective only if your spouse predeceases you? Yes/No

If you have minor children, who would you nominate to be their guardian (assuming your spouse predeceases you)? If that person is unable to serve, who would you nominate instead?

First Choice: _____ Second Choice: _____

Would you like to create a trust for your children (even if they are not minors at the time of your death)? Yes/No If your answer is "Yes", list the names of your first and second choices to serve as trustee. [A bank can serve as trustee, if you wish.]

First Choice: _____ Second Choice: _____

REFERRAL SOURCE (for example, friend, relative, another attorney, Yellow Pages, advertisement): _____