

II. CHILDREN'S INFORMATION

10.

Name (First, Middle & Last, if different from yours)	Age

11. If you have stepchildren, do you want them to be included in your Will just as if they were your natural children? Yes No Not Applicable

III. DISPOSITION OF PROPERTY

In the Will to be drafted for you, your entire estate will pass to your children in equal shares. If any of your children die before you (or at the same time as you), that share will pass to the deceased child's children, if any.

12. Do you have any property or money that you would like to pass differently than discussed above?
 Yes No

If YES, complete the chart below. If NO, go to Question #13.

Name of Individual or Charity	Describe Property/Money Being Passed

13. If all of your children died before you (or at the same time as you) and left no children of their own, to whom would you want your property to pass? You may, but do not have to, name more than one person. If you choose not to name anyone, your property will pass according to the North Carolina laws of intestacy. Your attorney can explain this to you in more detail during the consultation.

Pass according to laws of intestacy; OR

- (1) Name:

City, State of Residence:

- (2) Name:

City, State of Residence:

14. Who do you want to be the Executor of your estate? Please provide an alternate in the event the person you named could not act as your Executor.

Name:

City, State of Residence:

(Alternate) Name:

City, State of Residence:

IV. ADDITIONAL DOCUMENTS

15. In addition to the Will, our office will draft a Living Will, a Durable Post-Incompetency Power of Attorney, and a Health Care Power of Attorney. Please provide the name, address and phone number of the person you wish to act as your attorney-in-fact in these documents. If for any reason this person could not so act, please provide the name, address and phone number of an alternate.

Name:

Address:

Phone:

(Alternate) Name:

Address:

Phone:

V. ATTORNEY FEES

16. STANDARD FEE: Our firm charges **\$500.00 per person** for the services described herein. This price includes the initial consultation, the drafting and editing, if necessary, of all four estate planning documents, and their execution. Please note, however, that should you need a more complex will which falls outside the parameters of this intake sheet, there will be an additional fee. Please discuss your estate planning needs with your attorney during the consultation, and you will be informed of any additional fee, if applicable, at that time. Payment may be made at the time the final documents are signed.

VI. VALUE OF ESTATE

17. My assets, less all debts, would amount to *less* than \$11,580,000. (Include the face value of all life insurance).
- My assets, less all debts, would amount to *more* than \$11,580,000. (Include the face value of all life insurance).

This button will open your email application to send this completed form to our office. If your computer does not support this function, please save the file and email the completed form to beth.wolfe@wolfelawnc.com