

**Law Office of  
JEFFREY W. PORTER, PC**

711 Princess Street  
Wilmington, NC 28401

Telephone (910)763-2417  
Facsimile (910)763-5395  
Jeff@Jeffreywporter.com

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GENERAL WILL INFORMATION FORM

In addition to handling real estate transactions, we offer assistance in preparing Wills and related documents. If you are interested in having us prepare a Will for you, the attached form will help. It sets forth some basic questions and information about preparing a Will.

In order to begin the process, please complete the attached "Will Information Form" and fax or email or mail it to me. I will prepare a draft of the Will and related documents, and we can then arrange a time to meet at my office, where we will review the draft of the Will, discuss the terms, make any revisions needed, and sign your Will. (If you have a real estate closing coming up, it may be possible to discuss and sign your Will following closing.)

Please bear in mind that this form is used in the preparation of what are known as "simple wills" -- that is, wills that do not contain tax-oriented trusts or other tax planning features. Such tax planning features are generally helpful to people with large estates. If you believe you could benefit from such tax planning, I recommend that you discuss your estate planning needs with an accountant and/or a tax attorney.

My fee is typically determined by the complexity of the Will. Generally, my fee schedule is as follows:

<u>Document:</u>	<u>Individual</u>	<u>Couple (2 documents)</u>
Basic Will	\$300	\$550
Power of Attorney*	\$100	\$125
Health Care Power of Attorney*	\$100	\$125
Living Will*	\$100	\$125

(\*See below for explanation of these documents.)

Thank you. Please call me with any questions.

Jeffrey W. Porter

Attorney at Law

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WILL INFORMATION FORM

Your Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

1. Specific Distributions

You may wish to leave specific items to specific individuals or organizations. If so, please list them here: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. General Distribution of Assets

After any "specific bequests" are made, who would you want to receive your assets? Please list these "beneficiaries". You can name more than one beneficiary, and divide your estate in any way you wish. Please feel free to make any notes regarding distributions to various people (for example, you could specify percentages, so that person A receives 25% of your estate and person B receives 75%).

Beneficiaries: \_\_\_\_\_ (Age: \_\_)

\_\_\_\_\_ (Age: \_\_)

\_\_\_\_\_ (Age: \_\_)

Notes:

\_\_\_\_\_  
\_\_\_\_\_

3. Executors, Guardians, Power-of-Attorney

a. Executor. You must choose someone to be the "personal representative", or "executor", of your estate upon your death. Please name that person or entity below, and please name an "alternative executor" in case the first executor predeceases you or is unwilling or unable to serve as executor.

Executor: \_\_\_\_\_

Alternative Executor: \_\_\_\_\_

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b. Guardian. If you are the parent or guardian of children under the age of 18, you should appoint a "guardian", who would serve as the legal caretaker of your children until they reach the age of 18:

Guardian: \_\_\_\_\_

c. Power of Attorney (and/or Health Care Power of Attorney) (see explanation below). You may choose someone to act on your behalf under a General Power of Attorney, a Health Care Power of Attorney, or both:

General Power of Attorney: \_\_\_\_\_

Health Care Power of Attorney: \_\_\_\_\_

4. Burial

Do you want to specify any particular requests regarding your body, such as burial, cremation or other terms? If so, please specify:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Other documents

If you would like me to prepare any or all of the following documents, please let me know.

Living Will ("Declaration of Desire for a Natural Death"). This instrument is your statement that you do not wish your life prolonged by artificial means, if your condition is hopeless and you are in a "terminal and incurable" or "persistent vegetative" condition.

Health Care Power of Attorney This appoints someone to act on your behalf in making health care decisions, if you are unable to do so.

General Power of Attorney. This appoints someone to act on your behalf in a variety of areas. It can be as broad or as limited as you choose.

Please be aware that this "will information form" is for your reference and does not describe all of your options regarding your will or your estate planning.