

We The People, P.S. Law Office

6109 93rd St SW Lakewood, WA 98499

253.588.8811

Estate Planning Documents Made Simple and Affordable

Your Upcoming Estate Planning Appointment

Thank you for choosing We The People Law Office to assist you with your Last Will and Testament or Revocable Living Trust.

To help you prepare for your appointment, we've provided a worksheet designed to get you thinking about the types of information and decisions that will be discussed. This worksheet:

- - Is not used to draft your legal documents
- - Does not need to be exact or complete
- - Is meant to help you gather accurate, current legal names of individuals who may be included in your estate plan

What to Expect:

During your appointment, we will:

- - Go over your family, financial, and personal circumstances
- - Help identify your goals and priorities
- - Offer clear, simple options to meet your unique needs

Don't worry about having all the answers in advance— we're here to guide you through the entire process.

Helpful Tip:

Avoid overthinking the worksheet—it's just a tool to start the conversation. Bring it with you if completed, but it's perfectly okay if it's not finished.

We look forward to helping you create a plan that gives you peace of mind.

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Will / Living Trust Client Information Form

1. Client Information

Full Legal Name (Client): _____

Full Legal Name (Spouse, if applicable): _____

Phone Number: _____

Email Address: _____

Address: _____

2. Children/Stepchildren (biological & adopted) List children in birth order. (oldest to youngest) Include ALL children even if they're not inheriting.

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Relationship

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4. Executor(s) / Trustee(s) (The person who will settle your estate.)

Primary Executor/Trustee - Name: _____

Primary Executor/Trustee - Relationship: _____

Backup Executor/Trustee #1 - Name: _____

Backup Executor/Trustee #1 - Relationship: _____

Backup Executor/Trustee #2 - Name: _____

Backup Executor/Trustee #2 - Relationship: _____

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5. Guardian(s) for Minor Children (if applicable)

Primary Guardian - Name: _____

Primary Guardian - Relationship: _____

Backup Guardian #1 - Name: _____

Backup Guardian #1 - Relationship: _____

Backup Guardian #2 - Name: _____

Backup Guardian #2 - Relationship: _____