



1812 East Blvd. **FAX:** 704-372-2753
Charlotte, NC 28203 **TEL:** 704-625-4040

www.piferestatelaw.com
info@piferestatelaw.com

The Law Office of Deni C. Pifer, PC
Member of North Carolina and South Carolina Bars

Date: _____

Full Name: _____ **Date of Birth** _____

Spouse: _____ **Date of Birth** _____

Address: _____ (street)
_____ (city, state, zip)
_____ (county)

Email Address(es): _____

Telephone numbers: _____ (home)
_____ (cell)
_____ (spouse cell)

Are you known by any other names? If so, please list:

Is your spouse known by any other names? If so, please list:

Are you a U.S. Citizen? _____ **Is your spouse a U.S. Citizen?** _____

Are you presently married, separated, divorced, or single? _____

Please list all Children/Grandchildren:

Name	Age/Birthdate	Marital Status	Names/Ages of their children	Natural/Adopted	His/Hers/Theirs



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Guardian for minor children?

Name/Address: _____

What is your relationship to Guardian?

Alternate Guardian? Name & relationship?

Executor/executrix of your will?

Spouse? YES OR NO

Alternate? _____

Second Alternate? _____

(Each spouse can have different executor/alternate)

PERSONAL PROPERTY DISTRIBUTION

All to spouse if spouse survives you? YES OR NO

If spouse does not survive you, to children in equal shares or as they choose (for example, if children are below 21, executor can decide, then after 21, children decide)?

If you have no spouse and/or no children, then who would you like your personal property to go to?

Do you have any specific bequests or charitable bequests?

Do you want some personal effects distributed by a separate list attached to the will (suggestion in NC, rule in SC)?



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RESIDUARY ESTATE (all other property)

Do you want all property to go surviving spouse? Yes/No

What is your desired disposition of assets if you are not survived by your spouse (or you have no spouse)? (note: if in Trust for children, see next question).

Assets in trust for children at death of surviving spouse or directly to children?

If trust, name and address of trustee:

Alternate trustee?

At what age do children eventually receive assets (for example, the trust may state for children to receive 1/3 of the assets at age 30, another 1/3 at age 35, and the remaining amount at age 40, however, throughout the trust period, they will receive funds if needed for education, health, etc. at the discretion of the trustee)?

Do you expect any inheritances? If so, please estimate:

Are you or your spouse the beneficiary of any trust? If so, please list details:

Have you or your spouse made any substantial gifts (over the amount of \$13,000) in the past? If so, please list details:



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Do you and your spouse have a pre-nuptial or a post-nuptial agreement of any kind concerning the disposition of assets in the event of death and/or divorce? Yes/No
If so, please include a copy.

Do you have prior wills? If so, please enclose a copy.

Health Care Power of Attorney: Spouse? YES OR NO

Alternate 1:

Name/relationship: _____

Alternate 2:

Name/relationship: _____

Durable Power of Attorney: Spouse? YES OR NO

Alternate?

Name/Address/Relationship: _____

SEE NEXT PAGE FOR ASSET LIST



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ASSETS:

Estimated Market Value

ASSET	Self	Spouse	Joint
Cash			
Checking Accounts			
Savings Accounts			
Personal Property			
Investment Accounts			
Other Stocks			
Bonds			
Loans to others (notes or mortgages receivable)			
Residence			
Real Estate (Please list in which state real estate is locate)			
Business Interests			



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Pension			
IRA and/or 401(k) (please list who is beneficiary)			
Other Property			
Collectibles, etc.			

LIFE INSURANCE:

Company	Insured	Beneficiary	Cash Value	Face Amount
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

LIABILITIES:

Liability	His	Hers	Theirs
Notes/Mortgage Payable			
Credit Card(s)			
Personal Loans			
Life Insurance Loans			
Other Debts			



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***NOTE:** Please call Deni Pifer to discuss your documents or set up an appointment. You have no financial obligation until you decide to have the attorney prepare the documents. Ms. Pifer does not represent you until you've signed a letter of retainer. Thank you.