

Sample Will Intake Packet – Attorney Review

This sample illustrates a **WILL-ONLY** intake prepared by a client using TrustPrep. It focuses on testamentary intent, guardianship, fiduciary nominations, and asset distribution. **Trust formation and trust administration details are intentionally omitted.**

Client Snapshot (fictional example)

Client	John A. Carter (Age 42)
Spouse	Emily R. Carter (Age 40)
Address	1428 Bayou Oaks Dr, Lafayette, LA 70506
Phone / Email	(337) 555-0142 · john.carter@example.com
Primary Goal	Simple will; spouse-first plan; guardians for minors

Family & Dependents

Name	Relationship	DOB / Age	Notes
Lucas Carter	Child	2009-08-14 (16)	Minor
Ava Carter	Child	2013-03-22 (12)	Minor

Fiduciary Nominations

Executor (Primary)	Emily R. Carter (spouse)
Executor (Alternate)	Michael T. Carter (brother)
Guardian (Primary)	Emily R. Carter
Guardian (Alternate)	Sarah Nguyen (family friend)

Beneficiaries & Distribution Plan

Residuary Estate: 100% to spouse if living; otherwise equal shares to children *per stirpes*. If no spouse/descendants, then to Michael T. Carter.

Contingency: If a child is under 25 at distribution, client requests counsel recommendation for best practice under Louisiana law.

Specific Bequests

Item / Gift	Recipient	Amount / Description	Notes
Cash	St. Jude Children's Research Hospital	\$10,000	Charitable bequest
Personal effects	Emily R. Carter	All tangible personal property	Household items, jewelry, etc.
Firearm collection	Michael T. Carter	3 items (list available)	Transfer per applicable law

Asset Snapshot (for context)

Client provided the following non-exhaustive asset summary to help counsel identify probate considerations. This section is informational and not a funding plan.

Category	Institution / Description	Approx. Value	Title / Beneficiary
Home	Primary residence (Lafayette, LA)	\$285,000	Joint w/ spouse
Bank	Checking – Bayou Community Bank	\$18,500	Joint w/ spouse
Retirement	401(k) – Employer plan	\$164,000	Beneficiary: spouse
Life Insurance	Term policy	\$250,000	Beneficiary: spouse
Vehicle	2020 Ford Explorer	\$22,000	Owned by client

Additional Preferences & Notes

Funeral / Disposition	Prefers cremation; service in Lafayette; no prepaid plan.
Digital Assets	Client uses password manager; prefers spouse access; list maintained separately.
Pets	1 dog (Golden Retriever). Caregiver: spouse; alternate: Sarah Nguyen.
Special Circumstances	None disclosed (no prior marriages; no expected disputes).
Questions for Counsel	Confirm minors' inheritance planning if spouse predeceases; confirm Louisiana will execution formalities.

Prepared using TrustPrep.org · Client-provided information for attorney review · TrustPrep is not a law firm and does not provide legal advice.

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