



*Illinois Chapter
Your Liver. Your Life.*

WILL KIT

A tool for assembling the
Estate-planning information
Your attorney will need.

The Challenge

**To prevent, treat and cure
Hepatitis and other liver diseases**

Thank you for requesting the American Liver Foundation's Will Kit. We hope you will find it useful as you prepare to meet with your attorney to create a new estate plan.

Every person – no matter what other estate planning arrangements exist – should have a will. A will provides a clear and specific understanding of how you want to transfer your assets. If you should die without a will, your assets will be distributed according to state laws – regardless of your wishes.

Even if you have a will and an estate plan, it is important that they be reviewed periodically to ensure that they continue to take into account evolving circumstances and tax laws. Many changes in your life, such as the birth of children or grandchildren, marriage, divorce, or the death of a loved one, can result in your wishes not being fulfilled.

To help you plan your estate, the American Liver Foundation has prepared this workbook to assist you in gathering all the information your attorney should need. Our workbook will also make it easier for your loved ones, in the event of your disability or death, to locate important estate information.

We urge you as a friend and supporter of the American Liver Foundation, to speak with your lawyer about including a charitable bequest to our organization in your will. Your legacy to the American Liver Foundation will enable us to continue, well into the future, the life enhancing work you generously support today. If you have any questions about our work or how to make gifts to us through your will, please call me at 312.377.9030.

I am pleased to send you our Will Kit, and thank you for your ongoing support to the American Liver Foundation.

Sincerely,

Jacqueline A. Dominguez
Illinois Chapter Executive Director

**PREPARING FOR AN ESTATE-PLANNING CONFERENCE WITH YOUR
ATTORNEY**

In preparing for an estate-planning conference with your attorney, you will need the following documents and information.

PERSONAL INFORMATION

Date this form was completed:

Legal Name

Spouse

Permanent Address

Street

City

State

Zip

Date of Birth (Self)

(Spouse)

Telephone (Home)

(Work)

Soc. Sec. # (Self)

(Spouse)

Birth Certificate Location

Copy Location

Date of Marriage

Place of Marriage

If divorce or separated:

Include names and dates of previous marriages, whether the marriage is ended by divorce or legal separation, and the location of papers.

If spouse is deceased, details:

Name:

Date of marriage:

Date of death:

Location of will:

Location of federal estate tax return:

Location of gift tax returns:

There is is not a prenuptial agreement

Location of prenuptial agreement

U.S. Citizen? Yes No

If not a U.S. citizen by birth, indicate date and place of naturalization

Naturalization Date Place

Naturalization Papers Located

Spouse:

U.S. Citizen? Yes No

If not a U.S. citizen by birth, indicate date and place of naturalization

Naturalization Date Place

Naturalization Papers Located

Other Citizenship

NEAREST RELATIVES

List in order

1. Children 2. Grandchildren 3. Brothers and/or sisters 4. Parents 5. Nieces and/or nephews

NAME	RELATIONSHIP	DATE OF BIRTH	ADDRESS

CERTIFICATES OF DEPOSIT

BANK AND ADDRESS	CERTIFICATE #	MATURITY DATE	TITLE*	AMOUNT
				\$
				\$
				\$
				\$
				\$
				\$

STOCKS, BONDS, MUTUAL FUNDS HELD IN BROKERAGE ACCOUNTS

NAME OF BROKER/ACCOUNT	# OF SHARES	COMPANY	TITLE*	VALUE
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$

**Husband, wife, jointly (Indicate joint tenant if not spouse)*

SECURITIES NOT HELD IN A BROKERAGE ACCOUNT

TYPE OF SECURITY	TITLE*	SERIAL #	DATE OF PURCHASE	AMOUNT
				\$
				\$
				\$
				\$
				\$
				\$
				\$

LOCATION OF ANY STOCK CERTIFICATES, BONDS, OPTIONS, ETC., THAT ARE NOT HELD IN BROKERAGE ACCOUNTS

MONEY INVESTED IN MORTGAGES, PERSONAL LOANS, TRUST DEEDS

(MONEY OWED TO YOU)

WITH WHOM & ADDRESS	COST WHEN ACQUIRED	TITLE*	CURRENT VALUE
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$

*Husband, wife, jointly (Indicate joint tenant if not spouse)

REAL ESTATE OWNED

TYPE OF PROPERTY & LOCATION	COST WHEN AQUIRED	TITLE*	CURRENT VALUE	DEBT/LENDER
			\$	
			\$	
			\$	
			\$	
			\$	

OTHER ASSETS

TYPE OF PROPERTY	TITLE*	COST BASIS	DATE OF INVESTMENT	CURRENT VALUE
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$

**Husband, wife, jointly (Indicate joint tenant if not spouse)*

LIFE INSURANCE YOU OWN (ON YOUR OWN LIFE)

COMPANY	TYPE OF POLICY	BENEFICIARY	AMOUNT
			\$
			\$
			\$
			\$
			\$
		TOTAL	\$

COMPANIES OR ORGANIZATIONS THAT OWN INSURANCE POLICIES ON YOUR LIFE

COMPANY	TYPE OF POLICY	BENEFICIARY	AMOUNT
			\$
			\$
			\$

INSURANCE OWNED BY YOU ON THE LIVES OF OTHERS

COMPANY	TYPE OF POLICY	BENEFICIARY	AMOUNT
			\$
			\$
			\$
			\$

LOCATION OF LIFE INSURANCE POLICIES

OTHER INSURANCE

COMPANY	TYPE OF POLICY	POLICY #	COVERAGE

INDIVIDUAL RETIREMENT ACCOUNTS, PENSIONS, RETIREMENT OR DEATH BENEFIT PLANS

FUND NAME & COMPANY	ACCOUNT #	BENEFICIARY	TELEPHONE	AMOUNTS
				\$
				\$
				\$
				\$
			TOTAL	\$

SAFE DEPOSIT BOXES

BOX LOCATION	BOX#	KEY LOCATION	NAMES OF OTHERS WITH ACCESS

I am currently I expect to be the beneficiary of a bequest.

Testator's name _____ Approximate Value \$ _____

Total approximate value of estate \$ _____

I am currently I expect to be the beneficiary of other income or assets.

Source's name _____ Approximate Value \$ _____

LOCATION OF ANY EMPLOYMENT CONTRACTS OR BUSINESS AGREEMENTS RELATING TO INTERESTS IN
CORPORATIONS, PARTNERSHIPS, AND SOLE PROPRIETORSHIPS

WHAT YOU OWE

LOANS

TO WHOM DEBT OR MORTGAGE IS OWED	ADDRESS	PAYMENT DATE	AMOUNT
			\$
			\$
			\$
			\$
TOTAL APPROXIMATE INDEBTEDNESS			\$

TRUSTS

Location of any trusts that you have created, or under which you are a beneficiary

TAX RECORDS

Location of tax records

PERSONS

Persons, other than nearest relatives, whom you wish to include in your estate planning:

Name Relationship

Address

Name Relationship

Address

Name Relationship

Address

SYNAGOGUE

RABBI

EXECUTOR

Name Telephone

Address

ALTERNATE EXECUTOR

Name Telephone

Address

GUARDIAN FOR YOUR CHILDREN

Name Telephone

Address

ALTERNATE GUARDIAN FOR YOUR CHILDREN

Name Telephone

Address

TRUSTEE FOR CHILDREN'S INTEREST

Name _____ Telephone _____

Address _____

YOUR ACCOUNTANT

Name _____ Telephone _____

Address _____

YOUR ATTORNEY

Name _____ Telephone _____

Address _____

YOUR FINANCIAL PLANNER

Name _____ Telephone _____

Address _____

PLAN YOUR ESTATE DISTRIBUTION

You do not need to describe every item of your personal or real property in your will. However, if there is some specific asset that you want to go to a certain individual, list it here. Also, if you wish to bequeath a specific sum of money to a person or charity, state the amount and the name.

PERSON	ADDRESS	ITEM, PROPERTY, OR SUM OF MONEY	LOCATION OF ASSET

ARRANGEMENTS

LOCATION OF LIVING WILL OR MEDICAL DIRECTIVES ORDER

MY PREFERRED FUNERAL AND BURIAL INSTRUCTIONS ARE

LETTER OF LAST INSTRUCTIONS

You may wish to write a letter of last instructions to your surviving spouse or other persons. This letter is not legally binding, as a will is meant to be, but it can be of great help. It allows you to communicate, in an informal and loving way, personal expressions, helpful information, or specific instructions such as:

- Location of your will, safety deposit boxes, important papers, and records
- Names and addresses of persons to help surviving spouse
- Names, addresses, and telephone numbers of individuals you wish to be notified of your death
- Funeral and burial instructions