

**Wendell L. Hawkins, P.A.**  
*Attorneys at Law*  
9 Buena Vista Way, Suite B  
Greenville, SC 29615  
Phone (864) 848-9370 Fax (864) 243-8137  
greenville@wlhawkinslawfirm.com

Simple Will Work Sheet

Please complete this form by answering every question. If a particular section does not apply, please mark the section or question as "N.A." or "NONE". This is a simple will and designed only to control the distribution of your assets at death. If your assets total more than approximately \$5,000,000.00, you should contact an attorney who specializes in estate planning. If your marital status changes, or heirs predecease you or your assets change significantly, you should schedule a consultation with our office to amend your will. Wendell L. Hawkins, P.A. does not automatically update wills or automatically notify clients when laws change that may affect the validity or interpretation of your will or changes in the Unified Credit under the Internal Revenue Code (the amount of your estate value which is not taxable). Wendell L. Hawkins, P.A. does not keep a copy of your will. Your will should be kept in a safe place and your family should know where you keep it.

1. Your Name: \_\_\_\_\_
2. Your County of Residence: \_\_\_\_\_
3. Your Address: \_\_\_\_\_
4. Your Phone Number: \_\_\_\_\_
5. Who do you wish to leave your property (both real and personal) to? Note: if you exclude your spouse or future born children, they may still have a legal claim to a portion of your estate, by nature of S.C. statutory law. IF YOU WANT TO MAKE SPECIFIC DEVICES OF CERTAIN PROPERTY TO CERTAIN INDIVIDUALS PLEASE USE "EXHIBIT A" **Note:** Personal Property can be left to individuals by an attachment to your will that can be added to, deleted or changed by you throughout your lifetime.

Name	Relation	Age
_____		
_____		
_____		

6. If your children are minors (under 18), who do you want to appoint as their caretaker/guardian: (Please provide a primary and alternative guardian)? \*Note: A biological parent will most likely be granted custody regardless of what is specified here.

Name	Address	Relation
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Primary \_\_\_\_\_

Alternate \_\_\_\_\_

7. If your children are minors (under 18), do you wish to establish a trust funded by the liquidation of assets for their care and maintenance? Yes No (Circle One)

It is advisable to appoint the guardian in question #6 as the Trustee of this trust. Do you wish to appoint the guardian as Trustee? Yes No (Circle One)

If you wish to appoint someone else as trustee, list that person here:

Name	Address	Relation
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\_\_\_\_\_

8. Please list the name of the individual that you want to administer the probate of your estate. \*Note your estate should be probated in the county in which you reside. Therefore, the individual you appoint to administer your estate should live close to that county to prevent inconvenience. The person you appoint should also be mentally and physically able to administer the estate.

Name	Address	Relation
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Primary \_\_\_\_\_

Alternate \_\_\_\_\_

I agree to and understand the declarations and limitations of representation made and disclosed in this work sheet.

\_\_\_\_\_ (Signature)

# EXHIBIT A

I wish to leave \_\_\_\_\_, to \_\_\_\_\_.

(Property description) (Person's Name)

I wish to leave \_\_\_\_\_, to \_\_\_\_\_.

(Property description) (Person's Name)

I wish to leave \_\_\_\_\_, to \_\_\_\_\_.

(Property description) (Person's Name)

I wish to leave \_\_\_\_\_, to \_\_\_\_\_.

(Property description) (Person's Name)

**OTHER SPECIFIC INSTRUCTIONS TO ATTORNEY:**

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.