



16. SPECIFIC (cash or in kind) BEQUESTS - Would you like to make any specific cash or in kind bequests (i.e., "I give \$500 to my friend, Tom Smith, if he survives me" or "I give my antique clock to my friend, John Doe, if he survives me")?

A. RESIDUE - Normally, your spouse is the beneficiary of your residuary estate (Example: Any property passing under your Will but not specifically bequeathed to others). Do you want your spouse to be your residuary beneficiary?

Yes \_\_\_\_\_ No \_\_\_\_\_

IF NO, PLEASE EXPLAIN:

17. CHOICE OF EXECUTOR - Initial Executor would normally be surviving spouse. Is this your desired choice for initial Executor in this case?

Yes \_\_\_\_\_ No \_\_\_\_\_

If no, list choice for initial Executor and successor Executor in the event the initial Executor is unable or unwilling to serve. Or, if you want a Successor Executor in event your spouse is unable or unwilling to serve, please complete Successor Executor information below:

Initial Executor

Successor Executor

Name:

Name:

Address:

Address:

Relationship:

Relationship



19. CHOICE OF GUARDIAN OF PERSON AND GUARDIAN OF ESTATE (FOR MINORS)

- A. Whom do you trust the most to take the responsibility for the physical well-being of your minor children? That is, who would you like to see your minor children live with in the event that both you and your spouse pass away? This is called Guardian of Person.

Please list names of person(s) to act as Guardian of Person of your minor children in order of priority (if more than one named) (make sure person(s) is/are willing to serve as Guardian of Person):

Name:

Address:

1)

2)

3)

- B. The person designated as Guardian of your children's well-being (also referred to as "Guardian of the Person") can, but need not, be the same person or persons who are responsible for taking care of your children's property while your children are minors. Do you want the same person who is Guardian of your children's well-being (Guardian of Person) to be the same person designated as Guardian of your children's property (also referred to as "Guardian of the Estate")?

Yes \_\_\_\_

No \_\_\_\_

If no, Please list name(s) of person(s)/entity(ies) to act as Guardian of Property of your minor children in order of priority (if more than one named) (make sure person(s) is/are willing to serve as Guardian of Property):

Name:

Address:

1)

2)

3)

**NOTICE TO SENDER**

This checklist contains confidential and privileged material for the sole use of the intended recipient, GETTLE & VELTRI, Attorneys. The checklist may be transmitted to Gettle & Veltri as follows:

Hand-delivered or mailed to:

(Insert name of attorney) \_\_\_\_\_  
Gettle & Veltri  
13 E. Market Street  
York PA 17401

FAX to attention of intended attorney at Gettle & Veltri:

717-848-1603

or emailed\* to intended Attorney at Gettle & Veltri:

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