

# DAVID LEE WELLS LAW OFFICE

329 Armour Road, North Kansas City, Missouri 64116  
Phone: 816-842-2171 · Fax: 816-842-2173  
www.davidwellslaw.com

David Lee Wells  
Attorney at Law  
lawoffice@davidwellslaw.com

## **RE: Will Packet**

Dear Client:

Enclosed is your Will Packet. Please fill out the enclosed documents.

1. Client Will Worksheet - Comprehensive list of your Assets, Liabilities, Life Insurance and whom you will designate as your Personal Representative.
2. Asset Location Record – List of where your important papers and documents are located. Provides a basis for your personal representative to locate necessary information should the need arise. This is for your files, however, we will be happy to keep a copy in our files if you so desire.
3. Why Make a Will – a brief description of the process that may take place after you are deceased.

If you have had a financial plan prepared by a Financial Planner, please bring it with you to your consultation with us.

Please call if you have any questions prior to your consultation. Our offices are located in Downtown North Kansas City at the corner of Armour & Erie Roads – one block east of CVS Drug Store and two doors east of Chappell's Restaurant on the south side of the street. We look forward to meeting with you.

Sincerely,  
DAVID LEE WELLS LAW OFFICE

*David Lee Wells*

DLW:lw

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## WILL INTAKE SHEET

The following information will be needed by your attorney in order to properly advise you and handle your case. Please *print* and fill out every applicable question. If a question is not applicable, please write N/A in the space. DO NOT LEAVE BLANKS. **This information will help us help you. If Mr. Wells is not available please leave detailed questions with the staff in order to obtain a response. Staff cannot give legal advice.**

DATE: \_\_\_\_\_  NEW CLIENT  PRESENT CLIENT EXISTING WILL?: Yes No

HOW DID YOU FIND OUR OFFICE?  WALK IN  INTERNET  REFERRED BY: \_\_\_\_\_

**NAME:** \_\_\_\_\_ **ADDRESS:** \_\_\_\_\_

SSN: \_\_\_\_\_ DOB: \_\_\_\_\_ WHERE WERE YOU BORN? \_\_\_\_\_ U.S. Citizen? Yes No

SPOUSE: \_\_\_\_\_ WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen? Yes No

EMPLOYER: \_\_\_\_\_ ADDRESS: \_\_\_\_\_

**Notice:** Fax, Cellular phone and e-mail communications are not secure. By providing our office the email address, fax number or cellular number is consent for us to use that conduit to contact you. You will need to provide an emergency contact number where we may leave a message for you.

CELL PHONE: (    ) \_\_\_\_\_ HOME PHONE: (    ) \_\_\_\_\_

BUSINESS PHONE: (    ) \_\_\_\_\_ FAX LINE:(    ) \_\_\_\_\_

EMAIL: \_\_\_\_\_ EMERGENCY CONTACT: \_\_\_\_\_

**NOTICE: David Lee Wells does not give immigration advice or tax advice. You must discuss those issues with a specialized attorney. If you are not a United States Citizen and plead guilty or are found guilty of a crime, abuse, protective order and/or for other reasons you may be deported.**

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### Children

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen? Yes No

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen? Yes No

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen? Yes No

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen? Yes No

### Children from prior marriage:

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen? Yes No

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen? Yes No

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen? Yes No

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen? Yes No

**Other dependents: (Parents, grandchildren, etc.)**

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen?  Yes  No

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen?  Yes  No

NAME: \_\_\_\_\_ DOB: \_\_\_\_\_

WHERE WERE THEY BORN? \_\_\_\_\_ U.S. Citizen?  Yes  No

***ASSETS***

	<b>Name &amp; Number</b>	<b>Value</b>	<b>J/H/W</b>
Real Estate & Location			
Savings Account			
Checking Account			
C.D.			
Money Market Account			
Mutual Funds			
Stock/Bonds			
IRA/Keogh/TSA			
Pension Plan Profit Sharing			
Other Tax Shelters			
Business Interests			
Other Property			
Funeral/Burial Provisions			
	<b>Total Value of Assets</b>		

**LIABILITIES**

Mortgage \$ \_\_\_\_\_ Credit Cards \$ \_\_\_\_\_  
 Auto \$ \_\_\_\_\_ Notes \$ \_\_\_\_\_  
 Other \$ \_\_\_\_\_

**Total Value of Liabilities** \$ \_\_\_\_\_

**Assets** \$ \_\_\_\_\_ (-) **Liabilities** \$ \_\_\_\_\_ (=) **Net Worth** \$ \_\_\_\_\_

# LIFE INSURANCE

	Name of Co	Beneficiary	Policy Number	Amount
h/w Group				
Individual				
			<b>TOTAL</b>	

Anticipated Inheritance        \$ \_\_\_\_\_

Value of Estate at Death (Net Worth + Insurance)        \$ \_\_\_\_\_

**Personal Representative** (entering of will, please be sure to provide a complete address, and telephone number)

1<sup>ST</sup> \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

2<sup>ND</sup> \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

3<sup>RD</sup> \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

## Guardian for Minor Children:

1<sup>ST</sup> \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

2<sup>ND</sup> \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

**FILE DESTRUCTION POLICY:** The attorney will retain the paperwork generated on a legal matter for one (1) year after the conclusion of the legal matter in storage. After one (1) year, unless you instruct my office otherwise, in writing, to the contrary we have the authority to destroy the file including your original documents without further notice to the client. The client should obtain all documents the client desires from the file at the time of the conclusion of the matter, and no later than three (3) month after the file is closed.

**I have read and understand the above and foregoing and the information I have provided is true and accurate to the best of my knowledge and belief and I am only seeking advice on the matter and/or matter(s) I have listed above.**

**SIGNATURE** \_\_\_\_\_ **DATE** \_\_\_\_\_

**SIGNATURE** \_\_\_\_\_ **DATE** \_\_\_\_\_

**DO NOT WRITE BEYOND THIS POINT - ATTORNEY USE ONLY**

**ATTORNEY WORKSHEET**

Disp. with Admin. \_\_\_\_\_ Declaration of Life Support \_\_\_\_\_

Organ Donation \_\_\_\_\_

Estate Divided: Trust \_\_\_\_\_ Charity \_\_\_\_\_

Specific Bequest: List \_\_\_\_\_ Other \_\_\_\_\_

Remainder to Spouse \_\_\_\_\_

If Spouse deceased then divide:

\_\_\_\_\_ % To \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number: \_\_\_\_\_

\_\_\_\_\_ % To \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number: \_\_\_\_\_

\_\_\_\_\_ % To \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number: \_\_\_\_\_

\_\_\_\_\_ % To \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Safety Deposit Box \_\_\_\_\_ will be kept at \_\_\_\_\_

Additional Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date Prepared: \_\_\_\_\_ Fee: \_\_\_\_\_

Date of Execution: \_\_\_\_\_ Notary \_\_\_\_\_

Witnesses: \_\_\_\_\_

FEE ARRANGEMENT

Will - \$\_\_\_\_\_

Beneficiary Deed - \$\_\_\_\_\_

Power of Attorney - \$\_\_\_\_\_

Living Will - \$\_\_\_\_\_

Trust - \$\_\_\_\_\_

Per hour \$ \_\_\_\_\_

FILES

\_\_\_\_\_ **Open New File**

\_\_\_\_\_ **Include in Existing file**

\_\_\_\_\_ **Annual MISC File**

**NON-EMPLOYMENT:**

David Lee Wells will do nothing in this matter. He has told me to see another attorney.

DATE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

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## ASSET LOCATION RECORD

Name: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Social Security Number: \_\_\_\_-\_\_\_\_-\_\_\_\_ Spouse: \_\_\_\_\_

Employer: \_\_\_\_\_

(Complete specifics on all that apply)

A. Residence: \_\_\_\_\_

B. Safe Deposit Box: \_\_\_\_\_

Number Bank Address

C. Office: \_\_\_\_\_

Address: \_\_\_\_\_

D. \_\_\_\_\_

E. \_\_\_\_\_

F. \_\_\_\_\_

ITEM	LOCATION						ACCOUNT #
	A	B	C	D	E	F	
Birth Certificate	---	---	---	---	---	---	
Marriage Certificate	---	---	---	---	---	---	
Birth Certificate / adoption papers for children	---	---	---	---	---	---	
Social Security Card	---	---	---	---	---	---	
Divorce Decree	---	---	---	---	---	---	
Passport	---	---	---	---	---	---	
Power of Attorney – financial / health	---	---	---	---	---	---	
Health Care Directive	---	---	---	---	---	---	
My Will (original)	---	---	---	---	---	---	
My Will (copy)	---	---	---	---	---	---	
Spouse's Will (original)	---	---	---	---	---	---	
Spouse's Will (copy)	---	---	---	---	---	---	
My Burial Instructions	---	---	---	---	---	---	
Spouse's Burial Instructions	---	---	---	---	---	---	
Cemetery plot deed	---	---	---	---	---	---	





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## WHY MAKE A WILL...?

A person who makes a Will obtains the greatest freedom to dispose of their property. If a Will does not exist, the state controls your estate and appoints the Public Administrator to collect and divide your property for a fee. Your property in Missouri will be divided as follows:

1. With surviving children of deceased and spouse: First \$20,000 to spouse and remainder  $\frac{1}{2}$  to spouse and  $\frac{1}{2}$  to children.
2. With surviving children, one being a stepchild of the spouse (second marriage):  $\frac{1}{2}$  to the children and  $\frac{1}{2}$  to the spouse.
3. No surviving children, but surviving parent:  $\frac{1}{2}$  to parent and  $\frac{1}{2}$  to spouse.
4. Spouse receives 100% of estate only where there are no surviving children or parent. (All joint property passes to the survivor).
5. If no children or spouse: the Court will further divide your property to your heirs at law.

If you do not have a Will, you are not able to:

1. Have a say in who should be guardian of your minor children;
2. Dispense with administration of your estate and thereby reduce probate costs;
3. Provide for dispensing of personal property by a signed list.

Changes in your Will are usually made upon remarriage, moving to another state, death of heirs, need for tax planning, passage of time and changes in the law.

Because estate planning or making a Will looks to the future, you need to bring your Financial Plan for the future with you. Complete the Worksheet and Asset Location Record because it will be kept with the Worksheet to be available to your Personal Representative for help in locating all of your assets.