



**XVIII Airborne Corps and Fort Bragg Legal Assistance  
WILL WORKSHEET**

**\*\*Please Print Legibly and Fill Out Completely\*\***

**PROVIDING FOR YOUR CHILDREN**

*You will be given two options to provide financially for your children under your will.*

**CHOOSE ONLY ONE OPTION**

*A legal assistance attorney will discuss both of these options in further detail if you should have any questions about the selection that is best suited for you.*

**OPTION #1**

**EXPRESS TRUST:** If you are leaving your estate to children, you may include language in your Will that designates a Trustee who will have discretion over the money (this person may or may not be the same person you designated above to be the Guardian of your children). The person that you designate as Trustee can utilize funds in the Trust for education expenses like college, medical emergency, maintenance or even support for your children. However, the bulk of the funds will be held in trust for your children until they reach an age of your choosing or split into equal portions as suggested below. In addition, the Trustee can be listed as the person to receive your SGLI benefits to hold those funds *in Trust* for the benefit of your children.

If you select this option, you can decide at what age(s) your children will receive the remaining funds held in Trust (check one):

\_\_\_\_\_ (1/3 at 21, 1/3 at 25, 1/3 at 30)      \_\_\_\_\_ (1/3 at 25, 1/3 at 30, 1/3 at 35)      \_\_\_\_\_ or all at age:

My trustee will be: Primary: \_\_\_\_\_ Relationship: \_\_\_\_\_  
Alternate: \_\_\_\_\_ Relationship: \_\_\_\_\_

**OPTION #2**

**UGMA/UTMA:** If you are leaving your estate to children under the age 21, you may include language in your Will giving your executor discretion over the money. This allows the executor to give the money (all at once or periodically) to the guardian for the benefit of the child and/or hold it until the child reaches a designated age (18-21). Under this option, the executor does not have any discretion when the child reaches the designated age (18-21), regardless of the maturity level of the child, and **MUST** disburse any remaining funds to the child at that time.

If you select this option, your executor will manage the money until your child/children reach the age (circle one):

18      19      20      21

*It is also necessary to discuss with your legal assistance attorney how SGLI (or any other life insurance) should be coordinated with your will, particularly the provisions pertaining to your children. Your attorney can provide guidance on any changes that may need to be made to your SGLI election form.*

**GUARDIAN OF YOUR MINOR CHILDREN**

1. Do you have a child(ren), both natural or adopted, under the age of 18? **Yes / No**
2. If both you and your spouse were to die, would you like to nominate a Guardian to care for your child? **Yes / No**
3. If Yes, list the name of the Guardian(s) below:

Primary : \_\_\_\_\_ Relationship: \_\_\_\_\_  
Alternate: \_\_\_\_\_ Relationship: \_\_\_\_\_

**\*\*Be sure to notify your legal assistance attorney if any child has special needs or is receiving any benefits due to a disability\*\***