

# Beneficiary Worksheet

## Beneficiaries of Specific Gifts in Your Will

**Item:** \_\_\_\_\_

Beneficiary(ies): \_\_\_\_\_

Address(es): \_\_\_\_\_

Alternate Beneficiary(ies): \_\_\_\_\_

Address(es): \_\_\_\_\_

\_\_\_\_\_

**Item:** \_\_\_\_\_

Beneficiary(ies): \_\_\_\_\_

Address(es): \_\_\_\_\_

Alternate Beneficiary(ies): \_\_\_\_\_

Address(es): \_\_\_\_\_

\_\_\_\_\_

**Item:** \_\_\_\_\_

Beneficiary(ies): \_\_\_\_\_

Address(es): \_\_\_\_\_

Alternate Beneficiary(ies): \_\_\_\_\_

Address(es): \_\_\_\_\_

\_\_\_\_\_

## Debts Forgiven

**Amount Forgiven:** \_\_\_\_\_

Debtor: \_\_\_\_\_

Date of loan: \_\_\_\_\_

**Amount Forgiven:** \_\_\_\_\_

Debtor: \_\_\_\_\_

Date of loan: \_\_\_\_\_

**Amount Forgiven:** \_\_\_\_\_

Debtor: \_\_\_\_\_

Date of loan: \_\_\_\_\_

**Residuary Beneficiary or Beneficiaries**

Residuary beneficiary(ies) and percentage each one receives:

\_\_\_\_\_ %  
\_\_\_\_\_ %  
\_\_\_\_\_ %

**Alternate Residuary Beneficiary or Beneficiaries**

Alternate residuary beneficiary(ies) and percentage each one receives:

\_\_\_\_\_ %  
\_\_\_\_\_ %  
\_\_\_\_\_ %