

**INFORMATION FOR YOUR LAST WILL & TESTAMENT
AND/OR REVOCABLE LIVING TRUST**

REQUEST FOR PREPARATION OF:

☐ Revocable Living Trust and Pour Over Will ☐ Will Only ☐ Final Arrangements Instructions (optional)

SECTION 1 – PERSONAL INFORMATION

1. Marital Status: ☐ Married ☐ Not Married Gender: ☐ Male ☐ Female Date: _____

Your Name (First, Middle, Last) Soc. Sec. No. Date of Birth

Spouse's Name (First, Middle, Last) Soc. Sec. No. Date of Birth

Home Address (Number, Street) City State: Zip

E-mail address Home Telephone Cellular Telephone

You		Your Spouse	
Yes	No	Yes	No
Yes	No	Yes	No

2. Do you have a Will now?

3. Do you have a Trust now?

4. **Children** born to you or adopted by you:

	Name	Address	Gender	Date of Birth
A				
B				
C				
D				
E				
F				

5. Information pertaining to all **grandchildren**:

	Name	Address	Gender	Date of Birth
A				
B				
C				
D				
E				
F				

SECTION 2: INDIVIDUALS / INSTITUTIONS WHO WILL STEP IN UPON YOUR DEATH:

1. **Executor(s)** – Person who will serve as personal representative in the administration of your estate. Your **executor** is the person who will distribute your estate according to your wishes. This is usually your spouse or a close relative or friend.

#1 Choice:	Name	
	Address	
Alternate:	Name	
	Address	

2. Guardians for Minor Children ---Person who will raise your children if something happens to you and/or your spouse

#1 Choice:	Name	
	Address	
Alternate:	Name	
	Address	

Do you want to provide a brief explanation of why you chose this person as guardian in case any questions arise?

3. Trustee/Custodian for Minor Children --- Manages your children's' inheritance. This can be the same person as the guardian, another adult, and/or a corporate trustee.

#1 Choice:	Name	
	Address	
Alternate:	Name	
	Address	

4. Do you want your children's inheritances to be in a Uniform Trust to Minors Account (UTMA) – custodial account ending at age: 18 ☐ 21 ☐

OR

Minor's Sub trust – Trust account that must end by the time the minor reaches age 35. Choose an age where trust will terminate for the child: 18 ☐ 21 ☐ 25 ☐ 30 ☐ 35 ☐ – max age, or Other _____

SECTION 3 BENEFICIARIES – YOUR HEIRS

1. Beneficiaries: Your beneficiaries are the people and organizations who will inherit your property. You can designate a dollar amount or a percentage of your estate to be given to each.

(Provide addresses for individuals/organizations who are not your children/grandchildren, are they under 35, and the amount or Percentage as follows:

Name/Organization	Address	Under age 35?	Amount / %

2. Alternate Beneficiaries – If one of your beneficiaries pre-deceases their inheritance, do you want to divide their share among the others or do you want to leave their share to someone else (i.e.: Their spouse or children?)

☐ Re-distribute ☐ Distribute as below

Name of Beneficiary	Alternate Beneficiary

- 3. Special Gifts to organizations** - Do you want to make a gift (cash or a specific item) to a charity, foundation, religious or fraternal organization?

Name of Organization	Description of Gift

- 4. Special Gifts to Individuals** - Do you want to give any specific items to a family member or other individual? (For example: wedding ring to your daughter, gun collection to a son or nephew, etc.)

Name of Person	Description of Gift

- 5. Disinheriting** - Are there any relatives that you specifically do NOT want to receive anything from your estate?

- 6. Do you want to forgive any debts upon your death? If so, describe the debt indicating the amount and the name and address of the debtor:**

SECTION 4: FOR LIVING TRUSTS ONLY.

A Revocable Living Trust is an entity that survives your passing away. All property you transfer to your trust will pass on to your heirs without going through the court process of probate which may take years and could result in a substantial amount of legal and court fees. Since this trust is revocable, it can be changed at any time during your life and you are in total control of your property until you die. If you are married, your trust can leave your assets to your spouse upon your death with the final resting place of the property being with your final beneficiaries, such as your children. In order to benefit fully from the trust, all your property must be formally moved into the trust. This includes bank and investment accounts, real property, personal property and ALL property, provided there is no beneficiary already designated. To transfer real property (house, land, farm), you need to file a quit claim deed with the county recorder. To transfer bank and brokerage accounts, you must check with the institution as to how to formally transfer the property into the trust. Usually a letter or form will suffice, but every institution has different requirements.

You must name a successor trustee(s). You are the trustee of your living trust during your lifetime. When you pass away, a successor trustee is appointed to manage the trust. You may name a trustee and an alternate trustee. The successor trustee should be the same person as the executor of your estate you have named in your Will.

#1 Choice:	Name	
	Address	
Alternate:	Name	
	Address	

WILLS / TRUSTS QUESTIONNAIRE

1. List all property you own that has a recorded title – house, car, boat, bank accounts, investment accounts EXCEPT ANY ITEMS THAT ALREADY HAVE A BENEFICIARY SUCH AS: LIFE INSURANCE AND RETIREMENT ACCOUNTS – THEY ARE NOT INCLUDED IN A WILL OR TRUST SO DO NOT INCLUDE THEM HERE.

(-----check applicable box-----)

Description and location	Joint Property OR	Husband's Property	Wife's Property

2. List all other property you wish to include in the trust such as jewelry, furniture, antiques, and so on

(-----check applicable box-----)

Description and location	Joint Property OR	Husband's Property	Wife's Property

FINAL ARRANGEMENTS

If you desire to provide special instructions to your survivors regarding your final arrangements, complete the following:

1. What type of service do you want, how elaborate, and where? Are there any special people to contact? Do you want cremation?

2. If you have a cemetery lot or crypt, where is it located?

Name	City	State

ACKNOWLEDGMENT AND AUTHORIZATION

I understand that the Legal Document Assistant (LDA) preparing my documents is NOT an attorney, cannot select forms and DOES NOT give legal advice. I hereby direct the Legal Document Assistant to type and perform certain services as outlined in the Contract for Services which we each executed regarding this matter. I further declare that the foregoing information which I have provided is, to the best of my knowledge, true and correct.

Dated: _____

Signature