
JOHN D. CULBERT

ATTORNEY AT LAW

One Corporate Center
7401 Metro Boulevard
Suite 485
PHONE (952) 545-6776
FAX (952) 746-4180
EMAIL - john.culbert@culbertlaw.com

ESTATE PLANNING AND WILL INFORMATION FORM

Date: _____

1. TESTATOR/TESTATRIX - Person(s) making the Will(s)

Name: _____

Date of Birth: _____

Social Security No. _____

U.S. Citizen: Yes _____ No _____

Spouse's Name: _____

Date of Birth: _____

Spouse's Social Security No. _____

U.S. Citizen: Yes _____ No. _____

Street Address: _____

Apt. # _____

County: _____

City: _____ State: _____ Zip: _____

Home Phone: _____

Work Phone: _____

Email _____

Email _____

2. CHILDREN - Please list all children, including deceased children and children born out of wedlock. If you do not plan to provide for a child in your will, the child must be specifically omitted by name.

| <u>Name</u> | <u>DOB</u> | <u>Address & Telephone No.</u> |
|-------------|------------|------------------------------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

3. If any child should predecease a parent, should his/her share pass through to his/her children? Yes _____ No _____

4. **GUARDIANSHIP** - A guardian has physical and legal control over your children until they reach the age of 18.

First Choice:

Name(s): _____
Address: _____
Relationship (if any): _____

Alternate:

Name(s): _____
Address: _____
Relationship (if any): _____

5. **REVOCABLE TRUST FOR YOUR BENEFIT** - Are you interested in establishing a revocable trust for your and/or your spouse's benefit? Yes _____ No _____. If so, please indicate who the trustees should be (a trustee manages the assets).

A properly established and funded Revocable Trust will avoid a probate court proceeding to transfer title to your assets. You may name an individual, bank or trust company, or both.

First Choice:

Name(s): _____
Address: _____
Relationship (if any): _____

Alternate:

Name(s): _____
Address: _____
Relationship (if any): _____

Second Alternate:

Name(s): _____
Address: _____
Relationship (if any): _____

6. **TRUST FOR MINOR CHILDREN** - Do you wish to establish a trust for the benefit of your minor children? Yes _____ No _____. If so, please indicate who the trustees should be (a trustee manages the assets for your children until they reach specified ages). If you do not establish a trust, children inherit at age 18. You may name an individual, bank or trust company, or both.

First Choice:

Name(s): _____
Address: _____
Relationship (if any): _____

Alternate:

Name(s): _____
Address: _____
Relationship (if any): _____

