

LAST WILL AND TESTAMENT SURVEY FORM

A will only controls those assets you leave behind titled just in your name and that do not have a beneficiary attached to them. For example, if you own your home alone and have not recorded a transfer on death deed naming one or more beneficiaries you want to own your home when you after your death, the transfer of your home will be ordered by the probate court. If you have named someone in your will to inherit your home, the probate court will oversee the transfer to that person according to the terms of your will. To avoid the probate process you can name a beneficiary on your home, checking/savings accounts, investments, cars, boats etc. In Minnesota all wills are subject to the probate process unless the total assets to be transferred by a will are less than \$75,000 in value and do not include land. In the will, you name the person or persons you want to be responsible for settling your affairs, carrying out the terms of the will and otherwise implementing your last wishes and instructions. That person is called your personal representative.

TESTATOR (PERSON MAKING THIS WILL)

Full Name _____ Date of Birth _____

U.S. Citizen? Yes _____ No _____

Spouse's Full Name _____ Date of Birth _____

U.S. Citizen? Yes _____ No _____

Street Address _____ Apt _____ County _____

City _____ State _____ Zip _____

State of Residence _____

Telephone Number: H: _____ Cell: _____ Spouse Cell: _____

Email: _____

If you are single, are you: _____ Divorced _____ Widowed _____ Never Married

PERSONAL REPRESENTATIVE(S)

Please list the person or persons you've selected to serve as the personal representative of your estate. For married couples, it is assumed that you wish to serve as personal representative for one another.

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

ALTERNATE PERSONAL REPRESENTATIVE(S)

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

CHILDREN

Please provide your children's full names and dates of birth.

- 1.
- 2.
- 3.
- 4.

Please answer each of the following questions regarding your children.

1. Is there any reason NOT to treat your children equally? If so, explain.
2. Do any of your children have a disability?
3. Do you have any special concerns or objectives regarding your children?

GUARDIANS

Please name the person or persons who will serve as guardian of your minor children in the event that both parents die while the children are still minors. If you list a married couple to serve as guardians and that couple divorces please identify who should continue to serve as guardian.

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

SPECIFIC GIFTS

Please list below any special or specific gifts you would like to give. Do not list items of tangible personal property. The gifts here should be money gifts, such as a \$10,000 charitable donation. Please give the full name of the person or entity to receive the gift and their relationship to you, if any. If you choose to give special gifts, your will must be submitted to the probate court in order to have those special gifts transferred to the person or persons you name to receive them. If you do not wish to subject your loved ones to the probate process consider giving special gifts by some other method rather than including such instructions in your will.

Gift No. 1

Gift No. 2

OTHER CONSIDERATIONS

1. Do you expect any inheritance in the near future?
2. Do you intend to specifically disinherit anyone? If yes, please identify the individual(s) and their relationship to you.
3. If you have other instructions not addressed by any of the above please lists them below. Also include any questions you might have about the probate process that come to mind as you complete this form. Please feel free to add a separate sheet if needed.