

Guardianship Information for the Will based upon the Interview:

Client Names _____

Full Name(s): _____

Address: _____ Relation _____

Alternate Guardian (*Person to serve if the above named guardian cannot*):

Full Name(s): _____

Address: _____ Relation _____

Do you want to establish a Contingent Trust for minor children: Yes No

If so, what age should the child be to terminate the trust? _____

Who do you want to name as the Trustee for the Contingent Trust? (*The person to administer the trust*) Full Name: _____

Address: _____ Relation _____

Alternate Trustee for the Contingent Trust? (*The person to administer the trust if trustee above cannot*) Full Name: _____

Address: _____ Relation _____