

Client's Confidential Information

TRUST NAME: The _____ Living Trust

◆ Client's Personal Information

Client's Name: _____	Spouse's Name: _____
Soc. Sec. No. _____	Soc. Sec. No. _____
Date of Birth: _____	Date of Birth: _____
U.S. Citizen Yes No	U.S. Citizen Yes No
Address _____ _____	Work Phone _____ Home Phone _____
City _____	State _____
County _____	Zip _____

◆ Beneficiaries

Full Legal Name	Date of Birth	% of Estate
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____

- If a beneficiary predeceases you, his/her share is to be:
 _____ Divided equally among his/her children or issue if any.
 _____ Divided equally among the remaining beneficiaries.

• Settlor's Children

Child's Full Legal Name	Date of Birth	Parent Codes
1. _____	_____	H W AH AW DC DN
2. _____	_____	H W AH AW DC DN
3. _____	_____	H W AH AW DC DN
4. _____	_____	H W AH AW DC DN

_____ Additional Beneficiary information attached.

Parent Codes: H = Husband W = Wife AH = Adopted by Wife DC = Deceased W/ Children
 DN = Deceased w/ no Children



- Are any of your children receiving SSI? Yes _____ No _____
- If yes what is his/her name? _____

Gifts Prior to Distribution

Successor Trustee Name(s):

1. _____

2. _____

3. _____

4. _____

Please check the appropriate numbers:

- _____ 1. I wish the appointees to serve only in the above order.
- _____ 2. I wish the appointees number _____ to serve together.

Guardian(s) for minor children:

1. Child's name:	2. Child's name:
1. Guardian's name:	2. Guardian's name:
Address:	Address:

Additional Comments / Delivery Information:



Asset profile for:

<i>DESCRIPTION</i>	<i>FAIR MARKET VALUE</i>	<i>LIABILITY</i>	<i>NET</i>
<u>Residence:</u>			
<u>Other Real Estate:</u>			
<u>Time Share:</u>			
<u>Out of State Property:</u>			
<u>Personal Effects:</u>	<u>Fair Market Value:.</u>		
<u>Autos, Boats, RV's, Furniture. Etc.:</u>			
<u>*Notes Receivable:</u>			
<u>IRA Accounts:</u>			
<u>*Stocks:</u>			
<u>*Bonds (include tvce):</u>			
<u>*Certificate of Deposit:</u>			
<u>*Money Market Funds:</u>			
<u>Checking Accounts:</u>		<u>Savings Accounts:</u>	
<u>*Life Insurance:</u>			
<u>*Other Investments:</u>			
<u>TOTAL GROSS ESTATE:*</u>		<u>APPROXIMATE PROBATE:</u>	