

Trust Survey Form

A trust allows you to plan for much more than simply the transfer of assets after your death. A trust allows you to plan how you will care for yourself during a period of incapacity. A trust can be used to provide for children and grandchildren. You can also use trusts to reduce your estate tax burden. Used properly, a trust will allow your estate to pass without resort to the probate process and protect your confidentiality with regard to your final wishes. There are many different types of trust. For example, you can establish a charitable trust, business trust, cabin trust, or a special needs trust for a disabled child to name just a few.

Grantor: (Person creating the trust)

Name _____ Date of Birth _____

U.S. Citizen? Yes _____ No _____

Spouse 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: _____

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

Children

Name: _____

Date of Birth: _____

Address: _____

Telephone: Home: _____ Cell: _____

Name: _____

Date of Birth: _____

Address: _____

Telephone: Home: _____ Cell: _____

Name: _____

Date of Birth: _____

Address: _____

Telephone: Home: _____ Cell: _____

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Name: _____

Date of Birth: _____

Address: _____

Telephone: Home: _____ Cell: _____

- A. Have any children received an advance on their inheritance or are any children financially indebted to you? If so, please explain.

- B. Is there any reason NOT to treat your children equally? If so, explain.

- C. Do any of your children have a disability?

- D. 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.

Name: _____

Address: _____

Telephone: Home: _____ Cell: _____

Name: _____

Address: _____

Telephone: Home: _____ Cell: _____

Trustees: Typically, the Grantor) serves as trustee. However, you are free to choose whomever you like to serve as trustee of your trust. You may want to select a successor trustee as well.

Initial Trustee(s)

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

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Co-Trustee

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Successor Trustee(s)

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Specific Gifts

If you would like to make specific gifts to someone please describe the gift and identify the recipient of that gift. For example, you might want to donate \$10,000 to a specific charity. Please give the name, address and telephone number of the person to receive the gift.

Gift No. 1

Gift No. 2

Other Questions Relevant to Trust Creation

1. Do you intend to distribute whatever assets are left in your trust to your children equally and if not how do you want the remaining assets distributed?
2. Do you intend to specifically disinherit anyone? If yes, please identify the individual(s).
3. At what age do you want your child or children to receive an outright distribution of trust assets?

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4. In the event that your children pass away before you or if you do not have children who would you like to designate to receive the assets remaining in your trust following your death?

5. Do you intend to transfer real property such as your home or cabin into your trust? If yes, please provide the address and full legal description of the property you wish to transfer into your trust.

6. If you have other instructions not addressed by any of the above please lists them below. Also include any questions about trust and your goals that come to mind as you complete this form.