

TRUST WORKSHEET

Information About You:

Husband: _____
Last Name First Name M.I.
U.S. Citizen? Yes No
Wife: _____
Last Name First Name M.I.
U.S. Citizen? Yes No
Address: _____
City, State, Zip: _____
Phone: Home (_____) _____ Work (_____) _____

Children:

1. _____
Last Name First Name M.I.
Date of birth: ____/____/____ City and state of residence: _____
 Husband's child only Wife's child only Both

2. _____
Last Name First Name M.I.
Date of birth: ____/____/____ City and state of residence: _____
 Husband's child only Wife's child only Both

3. _____
Last Name First Name M.I.
Date of birth: ____/____/____ City and state of residence: _____
 Husband's child only Wife's child only Both

4. _____
Last Name First Name M.I.
Date of birth: ____/____/____ City and state of residence: _____
 Husband's child only Wife's child only Both
 Continued on another sheet

Specific Gifts:

On the death of the second spouse, are there specific items you wish to go to specific people (i.e., "my piano to my oldest daughter")? Yes No

If "Yes," please describe the property or the amount of cash and the beneficiary(ies) of this gift:

 Continued on another sheet

If any *specific beneficiary* dies before the second spouse, will his/her share go to: His/her children, if any; The other beneficiaries; This gift will not be made;

Other: _____

☛ Residuary Beneficiaries:

To whom will the residue (the portion of your estate remaining after disposing of the specific gifts) go *after the death of the second spouse*?

1. _____
Last Name First Name M.I.

City and state of residence: _____

Percent or fraction of estate (i.e., 25%, 33 1/3%, 1/4, 1/3) _____

If this beneficiary dies *before the second spouse*, will his/her share go to:

His/her children, if any; The other beneficiaries;

Other: _____

2. _____
Last Name First Name M.I.

City and state of residence: _____

Percent or fraction of estate (i.e., 25%, 33 1/3%, 1/4, 1/3) _____

If this beneficiary dies *before the second spouse*, will his/her share go to:

His/her children, if any; The other beneficiaries;

Other: _____

Last Name First Name M.I.

City and state of residence: _____

Percent or fraction of estate (i.e., 25%, 33 1/3%, 1/4, 1/3) _____

If this beneficiary dies *before the second spouse*, will his/her share go to:

His/her children, if any; The other beneficiaries;

Other: _____

Continued on another sheet

☛ Trustee:

Both husband and wife are usually co-trustees of the trust. On the death of the first spouse, the surviving spouse usually becomes sole trustee. On the death of the surviving spouse, the successor trustee distributes the trust assets to the beneficiaries according to your instructions. It is best to name at least two successor trustees.

First Successor Trustee: _____
Last Name First Name M.I.

City and state of residence: _____

Second Successor Trustee: _____
Last Name First Name M.I.

City and state of residence: _____

If you wish to name more successor trustees, in case the above cannot or will not serve, please check here and continue on the back of this sheet.

☛ Minor Children:

If one of your beneficiaries dies before you do and leaves minor children, at what age would you want these children to receive their inheritance? 18 21 25 Other _____

☛ Your Assets:

REAL PROPERTY: Please list address, city, county and state for each parcel of real property.

1. _____
Address City County State
a. Value: \$ _____ b. Mortgage: \$ _____ Equity (a - b): \$ _____

2. _____
Address City County State
a. Value: \$ _____ b. Mortgage: \$ _____ Equity (a - b): \$ _____

Continued on another sheet

For each parcel of real property, please provide a recent property tax bill and a copy of the deed. *(The deed will probably be titled "Grant Deed" or "Joint Tenancy Deed." It is **not** your "Deed of Trust" or "Deed of Reconveyance," but the document signed by the people who sold the property to you.)*

CASH ACCOUNTS: Please list all checking and savings accounts, Certificates of Deposit and credit union accounts.

1. _____
Institution Branch Acct. No. Balance

2. _____
Institution Branch Acct. No. Balance

3. _____
Institution Branch Acct. No. Balance

4. _____
Institution Branch Acct. No. Balance

Continued on another sheet.

