



LIVING TRUST INFORMATION WORKSHEET

INSTRUCTIONS FOR COMPLETION

Page 1

Personal Information

- Complete information as you want it to appear in Trust. Address must be your place of residence. The creator of the Trust is called a “Trustor”, and this section is regarding information for all Trustors.
- Your telephone number and email address are important.
- Include the name of your choice for your trust (for example, “John and Jane Doe Family Trust”)

Successor Trustee Information

- Successor Trustees are the people or organization (such as a bank) who will handle the affairs of the Trustee in the event of the death or disability of the Trustors. If possible, you should name two Successor Trustees.
- Successor Trustees can be (choose one):
 - Co-Trustees – two or more Trustees acting as a team. All decisions must be unanimous.
 - One Trustee at a time – second Trustee takes over if and when the first Trustee becomes unable or unwilling to act as Trustee.

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Beneficiary Information

- Beneficiaries are those that will receive a distribution of your assets upon the death of both Trustors. Beneficiaries may also be listed as Successor Trustees. Children of Trustors should be listed as beneficiaries even if they are to receive no distribution from the Trust.
- Complete all information for each beneficiary, including who is to receive each Beneficiary’s share if he/she dies before the death of both Trustors.
- Indicate the % share each receives upon the death of both Trustors. If there is to be special handling (specific gifts or handling of property by Successor Trustee, etc.), that should be described in a separate page and included with the worksheet.

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Beneficiary Information (Continued)

- Information for 4th beneficiary. If more than 4 beneficiaries, make a copy of page 2 and include with worksheet.
- Indicate whether beneficiaries will receive assets immediately or over time. You can indicate different schedules for each beneficiary.
- If you have minor children who are beneficiaries, the Trust provides that a separate Trust should be established for each child to receive the distribution. Choose at what age you desire those trusts to be dissolved and the assets distributed to the child.
- Give name and address of any Guardians for minor children that should be named in the Trust.

Power of Attorney and Advance Health Care Information

- As part of the Trust package, each Trustor will receive a Power of Attorney document that establishes a person to make financial decisions for that Trustor in the event of disability. Each Trustor should select a person (usually a spouse) to make those decisions if required, and a second person to do so if the initial selection is unable to act in that capacity.
- As part of the Trust package, each Trustor will receive an Advance Health Care document that establishes a person to make medical decisions for that Trustor in the event of disability. Each Trustor should select a person (usually a spouse) to make those decisions if required, and a second person to do so if the initial selection is unable to act in that capacity.
- Each Trustor should indicate his or her own selections, which may be the same or different.

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Current Income

- Income for each Trustor that may be relevant to estate planning involving the Trust.

Advisors Information

- Advisors currently being used by Trustors – will be listed in Trust. As guidance for Successor Trustees.

Financial Accounts

- Bank Accounts and other financial institutions where Trustors have accounts
- Account numbers are optional – may be added to Trust by Trustor upon receiving the completed Trust.

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Retirement Accounts

- Financial Accounts containing retirement instruments such as 401K, 403B, Annuities, etc.
- Account numbers are optional – may be added to Trust by Trustor 3

Pages 6-7

Securities Information

- Accounts holding securities, bonds, and other financial instruments.

Real Estate Information

- This includes any real estate owned by a Trustor that is to be placed into the Trust. Of all assets, real estate is the most important to place into the Trust. If any real property is left out of the Trust, it will likely require that the estate go through Probate Court, because real property not passed on via Trust usually requires probate.
- The requested information for each piece of real property must be listed by address on page 7 of the Worksheet.
- If a deceased spouse is listed as an owner on the current deed, a copy of a death certificate and/or an affidavit of death must be included with the Worksheet.
- A complete copy of the currently filed deed for each piece of real property must be provided with the Worksheet. As part of Trust documents, new deed will be provided transferring each property into the Trust.

Real Estate Contracts

- Any other real estate contracts such as those listed on the Worksheet must be listed, with copies of any deeds, contracts, promissory notes, etc.

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Life Insurance Policies

- Life Insurance policies and other policies that would be of value to your estate should be listed, along with the type of policy and the insured party.

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Mobile Homes

- Provide requested information along with a copy of any mobile home registration from the state or county.

Business Interests (Sole Proprietorship)

- Includes LLC's and businesses incorporated businesses wholly owned by Trustor(s) of the Trust.

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Partnership Interests

- Includes ownership in business entities owned in conjunction with parties other than Trustors.

Personal Property

- The Trust package you are purchasing will include a “Pourover Will” that will place into your Trust the personal property that you do not list elsewhere in the Worksheet. This would include furniture and personal effects of limited value, such as clothing and household furnishings.
- Items of personal property that have a higher value, such as art, jewelry, and automobiles should be listed in this section, along with the information requested.