

Check One Trust Type Only

Individual Revocable Living Trust Joint Revocable AB Living Trust Individual Irrevocable Life Ins. Trust Joint Irrevocable Life Ins. Trust
 "Special Needs" Trust for the benefit of _____ VA Benefit Trust

Grantor First Name _____ Init _____ Last Name _____

Grantor First Name _____ Init _____ Last Name _____

Trustee(s) (Check One) Jointly In Succession

Name _____ Relationship _____

Name _____ Relationship _____

For joint trusts: upon the death of the first Grantor, shall the surviving Trustee have unlimited or limited use and discretion over the deceased Grantor's share of assets?

Successor Trustee(s) (Check One) Jointly In Succession

Name _____ Relationship _____

Name _____ Relationship _____

Name _____ Relationship _____

Beneficiaries

Name _____ Relationship _____ % _____

Name _____ Relationship _____ % _____

Name _____ Relationship _____ % _____

Name _____ Relationship _____ % _____

Name _____ Relationship _____ % _____

Age(s) To Distribute to Minor Heirs _____

Special Instructions _____

ESTATE INFORMATION

ASSETS	OWNERSHIP	VALUE	DEBT AMT.
Residence			
Other Real Estate			
Cars, Boats, Etc.			
Checking Accts.			
Savings Accts.			
CD's/Money Market			
Stocks/Bonds/Mut. Funds			
Pension/IRA			
Annuities			
Life Ins. Face Amt.			
Life Ins. Cash Val.			
Personal Property			
Collectibles			
Miscellaneous			
TOTALS			

NOTE: Listing the assets in the "ESTATE INFORMATION" does not transfer the assets to the Trust.