

Revocable Trust Survey Form

A revocable trust provides a confidential way to manage your assets during incapacity and to transfer assets at death. A revocable trust may help with management of your tax burden so that you can leave the maximum amount of your assets to your beneficiaries. A revocable trust becomes irrevocable upon your death and all of the assets in the trust are not subject to the probate process. 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/Settlor: (Person creating the trust)

Full Name _____ Date of Birth _____

U.S. Citizen? Yes _____ No _____

Spouse Full 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: _____

Name: _____

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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. 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?

- C. At what age do you want your child or children to receive an outright distribution of trust assets?

- D. 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?

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

- F. Do you have any special concerns or objectives regarding your children?

- G. Do you intend to specifically disinherit anyone? If yes, please identify the individual(s).

Guardians

Please name the person or persons who will serve as guardian(s) of your **minor** children in the event that both parents die while the children are still minors. If you have selected a married couple to serve as guardians and the couple divorces which one should continue to serve as guardian of your minor children?

Name: _____

Address: _____

Telephone: Home: _____ Cell: _____

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Name: _____

Address: _____

Telephone: Home: _____ Cell: _____

Trustees: The Grantor usually serves as the initial trustee. However, you are free to choose whomever you like to serve as trustee of your trust.

Initial Trustee(s)

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Co-Trustee(s): You may name one or more individuals to serve as co-trustee with you or instead of serving in that role yourself. If you and your spouse are creating the trust, you will be listed as

Co-trustees.

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Successor Trustee(s): Successors take over when the initial trustees or co-trustees are no longer able to serve for any reason. Please list who you would like to serve as trustee if you are unable to continue to serve.

Name: _____

Relationship to you: _____

Address: _____

Telephone: Home: _____ Cell: _____

Name: _____

Relationship to you: _____

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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

Funding Your Trust:

Please explain what you would like to put into your trust. If you have real property (homestead, farm, cabin, undeveloped land) and would like to include that property in your trust, please complete a quitclaim deed survey form for each separate parcel of land that you own.

Final Considerations:

Please list your reasons and/or goals you want to make sure are reflected in the rules of your trust. For example, if you own a pet and would like a pet trust established to guarantee the care of your pet or if you own a business and want to be sure the business continues following your death, please provide that information. If you own a business please provide the business name, your ownership interests and your goals with regard to the transfer of your business interest upon death. If you co-own land or other property, please describe your ownership interest and goals for that property as well.