

LIVING TRUST INFORMATION QUESTIONNAIRE

Individual

YOUR INFORMATION

Legal Name <small>U.S. Citizen? Y N</small>	Name as it appears on your driver license, ID card, or passport:	
Street Address		
City, State, Zip		
Telephone	<small>Home</small>	<small>Work/Cell</small>
Email Address		
Social Security Number:	Date of Birth:	
Marital Status		

FAMILY INFORMATION

Please list the names and address information of all living children, if any.

Child Name		<small>Date of Birth</small>
Child's Street Address		<small>Gender</small> M F
City, State, Zip		
Child's Telephone		

Child Name		<small>Date of Birth</small>
Child's Street Address		<small>Gender</small> M F
City, State, Zip		
Child's Telephone		

Child Name		Date of Birth
Child's Street Address		Gender M F
City, State, Zip		
Child's Telephone		

Child Name		Date of Birth
Child's Street Address		Gender M F
City, State, Zip		
Child's Telephone		

Child Name		Date of Birth
Child's Street Address		Gender M F
City, State, Zip		
Child's Telephone		

Please list deceased children, if any, and whether they were survived by their own children:

Name	Date of Birth	Date of Death	Number of deceased child's children

CHOICE OF TRUSTEES

You will be the sole initial trustee of your trust. However, successor and/or alternate trustees must be listed in case of your death or incapacity. It is usually best to select named beneficiaries, family members, or long-time close friends as your successor trustees. You should list at least two choices for successor trustee in case your first choice is unavailable for some reason. The people you name here will have no power, control, or authority over you or your financial affairs while you are alive and have sufficient capacity to handle your own affairs.

Successor Trustee Choice #1 *There is no need to repeat an address if you have already written it once.*

Name	
Street Address	
City, State, Zip	
Telephone	

Alternate Successor Trustee Choice #2

Name	
Street Address	
City, State, Zip	
Telephone	

Alternate Successor Trustee Choice #3 (Optional)

Name	
Street Address	
City, State, Zip	
Telephone	

BENEFICIARIES

Beneficiaries are those people to whom you wish to pass your estate upon your death. It is important to know that beneficiaries can be changed anytime you like by amending your living trust. You may specify a set percentage of your estate to each beneficiary or you may choose to let your estate pass to your beneficiaries in equal shares. If you choose to specify percentages, please be sure the total equals 100%. If you check the "equal share" box you do not need to fill in the percentages. If you will be naming more beneficiaries, please make additional copies of this page.

Beneficiaries (Check here if all beneficiaries are to receive equal shares) *There is no need to repeat an address if you have already written it once.*

Name	
Street Address	
City, State, Zip	
Telephone	
Share	

Name	
Street Address	
City, State, Zip	
Telephone	
Share	

Name	
Street Address	
City, State, Zip	
Telephone	
Share	

Name	
Street Address	
City, State, Zip	
Telephone	
Share	

For Office Use Only

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POWER OF ATTORNEY CHOICES

There are two types power of attorneys commonly used in estate planning. The first is a durable power of attorney for assets and business affairs. Its purpose is to authorize someone to handle your day-to-day business affairs should you become incapacitated. The second is an Advance Health Care Directive (also know as a Durable Power of Attorney for health decisions). Both are designed to be “springing” power of attorneys – meaning that they only become valid if you become incapacitated or unable to handle your own affairs. You should list the person you wish to be your primary Power of Attorney holder and a second choice should your primary choice not be available to act on your behalf.

Assets and business affairs Power of Attorney Choice #1 *There is no need to repeat an address if you have already written it once.*

Name	
Street Address	
City, State, Zip	
Telephone	

Assets and business affairs Power of Attorney Choice #2 (alternate)

Name	
Street Address	
City, State, Zip	
Telephone	

Health Care Power of Attorney Choice #1

Name	
Street Address	
City, State, Zip	
Telephone	

Health Care Power of Attorney Choice #2 (alternate)

Name	
Street Address	
City, State, Zip	
Telephone	

EXECUTOR CHOICES

Your estate plan will be designed to avoid probate by distributing your assets by the instructions you provide in your trust. However, your estate plan will also include a pour-over will. The purpose of a pour-over will is to give instructions for any assets inadvertently left out of your trust. A pour-over-will acts as a safety net by instructing your chosen executor to transfer any estate assets to your trust for distribution to your heirs.

If everything is done correctly, pour-over-wills are not needed or used. However, any assets not properly deeded or titled to your trust will need to be transferred into the trust by the Executor of your estate. Please list your Executor choices below:

Primary Executor Choice: *There is no need to repeat an address if you have already written it once.*

Name	
Street Address	
City, State, Zip	
Telephone	

Secondary Executor Choice:

Name	
Street Address	
City, State, Zip	
Telephone	

SCHEDULE OF ASSETS

As an attachment to your Living Trust you need to make a list of your assets you intend to place in the trust. The schedule of assets should sufficiently identify the asset, but should not state values. For example, on bank accounts you would list the name of the bank and the account number, but you would not list how much money is in the account.

Note: Retirement accounts such as IRAs and 401ks do not have to be listed here. They are handled differently for tax reasons. The attorney will discuss this with you during your appointment.

Real Estate Owned:

Address, City, State	
Address, City, State	

Bank Accounts:

Bank name:	Account Number(s)
Bank name:	Account Number(s)
Bank name:	Account Number(s)

Securities Owned:

Broker name:	Account Number(s)
Broker name:	Account Number(s)
Broker name:	Account Number(s)

Do you have retirement accounts such as an IRAs or a 401ks?

Yes___ No___

Do you have life insurance or other pay-on-death policies?

Yes___ No___

Do you own a business interest that should be included?

Yes___ No___

LEGAL FEES AND INFORMATION

We try to have a “No Surprise” policy concerning legal fees. This means it is important to us that you should know up front what your legal services will cost. Your quoted price is what you should expect to pay; however, there are some special circumstances that require additional attorney work. With that said, here are some things that can cost extra if any of these specific conditions apply in your situation:

Additional Provisions and /or Other Attorney Work	Additional Fees
<u>Tax Bypass trust provisions.</u> Commonly referred to as A-B provisions. Strongly recommended for estates exceeding the individual estate tax exemption (currently \$2 million).	\$120
<u>Special needs trust provisions.</u> Usually needed if a beneficiary is handicapped or disabled and receiving government benefits. Protects from the beneficiary from losing his or her benefits and stops the government from taking the inheritance.	\$120
<u>Non U.S. Citizens.</u> Special estate tax considerations come into play with non U.S. citizens; therefore, special trust provisions are required.	\$120
<u>Assignment of business interests.</u> Necessary when a client owns a corporation, limited liability company, partnership, or other business entity.	\$60
<u>Drafting and recording of specialty deeds.</u> Occasionally clients need to remove a name on a property or to clear title before transferring into their trust. Includes the drafting of the deed, the drafting and filing of the required Preliminary Change Ownership Report, the County recording fees, all Notary fees, and sending everything to the County via certified mail.	\$100
<u>Drafting and recording of deeds for additional properties (concurrent with trust signing).</u> Many of our clients own more than one property. The full estate plan package includes the transfer of one property. The fee quoted here is for each additional property transferred and includes the drafting of the deed, the drafting and filing of the required Preliminary Change Ownership Report, the County recording fees, all Notary fees, and sending everything to the County via certified mail.	\$100
<u>Hourly Rate.</u> Our office strives to set flat rates on legal services so that clients will always know exactly what to expect regarding fees. In those unusual situations where a client requests work for which no flat rate has been established and cannot be estimated, our hourly rate will apply.	\$240-\$300

Our office also provides legal services in the areas of Probate (when necessary) and the formation of Corporations, LLCs, and Asset Protection Entities. We offer package pricing if you are interested in forming an LLC or Corporation at the same time as drafting your trust.