

LIVING TRUST INFORMATION QUESTIONNAIRE

Married Couple

YOUR INFORMATION

Spouse 1/ Husband Name	Name as it appears on your driver license, ID card or passport:	US Citizen* Y___ N___
Spouse 2/ Wife Name	Name as it appears on your driver license, ID card or passport:	US Citizen* Y___ N___
Street Address		
City, State, Zip		
Telephone	Home	Work/Cell
Email Address		
Spouse 1/Husband Date of Birth:		Spouse 2/Wife Date of Birth:

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Years Married:

A/B: Yes / No

Sep. Prop: Yes / No

Nom. Guard:
Yes / No

Ref. By:

Chase: Yes/No

FAMILY INFORMATION

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

Child Name		Date of Birth
Child's Street Address		Gender M___ F___
City, State, Zip		
Child's Telephone		

B 1H 2W

Child Name		Date of Birth
Child's Street Address		Gender M___ F___
City, State, Zip		
Child's Telephone		

B 1H 2W

*Non United States Citizens may need additional provisions in the trust due to special estate tax considerations. Drafting these provisions incurs an additional fee.

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		

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B	1H	2W
B	1H	2W
B	1H	2W

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

Have you had any other children not listed above, ever, in your life? Yes___ No___

CHOICE OF TRUSTEES/EXECUTORS

You will be the initial trustees of your trust. If one of you passes away, the surviving spouse will be the sole trustee. The successor and/or alternate trustees you name below will only become trustee(s) if neither of you are able. For successor trustee choices, it is usually best to select named beneficiaries, family members, or long-time close friends. 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.

Please list legal names, not nicknames.

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

Name		Gender M___ F___
Street Address		
City, State, Zip		
Telephone		

Alternate Successor Trustee Choice #2

Name		Gender M___ F___
Street Address		
City, State, Zip		
Telephone		

Alternate Successor Trustee Choice #3 (Optional)

Name		Gender M___ F___
Street Address		
City, State, Zip		
Telephone		

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Only**

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		Gender M___ F___
Street Address		Age
City, State, Zip		
Telephone		
Share		

Name		Gender M___ F___
Street Address		Age
City, State, Zip		
Telephone		
Share		

Name		Gender M___ F___
Street Address		Age
City, State, Zip		
Telephone		
Share		

Name		Gender M___ F___
Street Address		Age
City, State, Zip		
Telephone		
Share		

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I/N: I L
A _____
Rel _____

I/N: I L
A _____
Rel _____

I/N: I L
A _____
Rel _____

I/N: I L
A _____
Rel _____

Are any of the named beneficiaries currently receiving need-based government assistance (e.g. SSI, Medi-Cal)? Yes ___ No ___

POWER OF ATTORNEY CHOICES

There are two types of powers of attorney 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” powers of attorney – meaning that they only become valid if you become incapacitated or unable to handle your own affairs. Your spouse will automatically be your first choice. The selections you list below are only in case your spouse is unavailable or unable to act. Each spouse's choices can be different, if desired. ***Please list legal names, not nicknames.***

Assets and business affairs Power of Attorney Choice #1 (if spouse is not available) *There is no need to repeat an address if you have already written it once.*

	Spouse 1/Husband's Choices	Spouse 2/Wife's Choices
Name		
Street Address		
City, State, Zip		
Telephone		

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

Name		
Street Address		
City, State, Zip		
Telephone		

Health Care Power of Attorney Choice #1 (if spouse if not available)

Name		
Street Address		
City, State, Zip		
Telephone		

Health Care Power of Attorney Choice #2 (alternate)

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. If there is not enough space, please attach additional pages.

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___ |
| Have you loaned money to anyone and have a promissory note or recorded a deed of trust on that person's property? | Yes___ No___ |
| Do you have any 529/college savings accounts which you manage? | 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	Standard Rate	Qualified Discount Rate
<u>Tax Bypass trust provisions.</u> Commonly referred to as A-B provisions. Usually recommended for estates exceeding the individual estate tax exemption (currently in excess of \$11 million).	\$400	\$320
<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.	\$200	\$160
<u>Non U.S. Citizens.</u> Special estate tax considerations come into play with non U.S. citizens; therefore, special trust provisions may be required.	\$400	\$320
<u>Assignment of business interests.</u> Necessary when a client owns a corporation, limited liability company, partnership, or other business entity.	\$100	\$80
<u>Drafting and recording of specialty deeds.</u> Occasionally clients need to remove a name on a property or otherwise clear title before transferring into their trust. Includes the drafting of the deed, the drafting and filing of the required Preliminary Change Ownership Report, all Notary fees, and sending everything to the county via certified mail or attorney messenger service. County recording fees are <u>not</u> included.	\$150 plus recording fees*	\$120 plus recording fees*
<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, all Notary fees, and sending everything to the county via certified mail or attorney messenger service. County recording fees are <u>not</u> included.	\$150 plus recording fees*	\$120 plus recording fees*
<u>Drafting and recording out-of-state deeds.</u> We can prepare deeds for a few states other than California. Property owned out-of-state can and should be transferred to your Living Trust. Out-of-state deeds generally require more time and paperwork. The fee quoted here is for each out of state property transferred and includes the drafting of the deed, the drafting and filing of all supporting forms, all Notary fees, and sending everything to the county via certified mail. Recording fees are not included.	\$200 plus recording fees*	\$160 plus recording fees*
<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.	\$400	\$320

Our office also provides legal services in the areas of Probate (when necessary) and Trust Settlement.

*Recording fees are generally \$25. However, for Nevada it is \$40. Also, for any California properties which are not your primary residence, as of January 1, 2018, there is an additional \$75 state mandated SB2 - Building Homes and Jobs Act fee *per deed*.