



Information Needed To Prepare Trust, Will, Power of Attorney and Healthcare Surrogate

Full legal name: _____

Address: _____

Telephone #: _____ Alt. Telephone # _____

You are typically named as the initial Trustee of your Trust. Please list who you want to select as successor trustees of your Trust after you are deceased or unable to serve as Trustee?

Name(s) of First Successor Trustee(s): _____

Name(s) of Second Successor Trustee(s): _____

Please list the full legal name(s) of your children from oldest to youngest:
(Please list the names of all of your children, even if you are disinheriting that child)

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____

Do you have any deceased children? If so, please name: _____

Specific Bequests: Please list specific gifts, if any, (other than tangible personal property) you may wish to make after you pass away: (Example: "\$5,000.00 to my grandchild Jane Doe" or "\$5,000.00 to Habitat for Humanity")

- 1. _____
- 2. _____
- 3. _____

Distributions:

After you pass away, and after distribution of the specific bequests listed above, if any, please select how you want your remaining assets distributed by selecting one of the following:

- Equal shares to a list of beneficiaries
- Various percentages to a list of beneficiaries
- Other (Please attach a separate list)

Please name each of your beneficiaries below:

1.

If you selected various percentages above, please provide the percentage _____%

If this beneficiary predeceases you, how should this share of your property pass? (If your beneficiary is a charity, you do not need to answer)

- To that beneficiary's children, or if none, then to the other surviving beneficiaries
- To the other surviving beneficiaries
- Other: _____

2.

If you selected various percentages above, please provide the percentage: _____%

If this beneficiary predeceases you, how should this share of your property pass? (If your beneficiary is a charity, you do not need to answer)

- To that beneficiary's children, or if none, then to the other surviving beneficiaries
- To the other surviving beneficiaries
- Other: _____

3.

If you selected various percentages above, please provide the percentage: _____%

If this beneficiary predeceases you, how should this share of your property pass? (If your beneficiary is a charity, you do not need to answer)

- To that beneficiary's children, or if none, then to the other surviving beneficiaries
- To the other surviving beneficiaries
- Other: _____

4.

If you selected various percentages above, please provide the percentage: _____%

If this beneficiary predeceases you, how should this share of your property pass? (If your beneficiary is a charity, you do not need to answer)

- To that beneficiary's children, or if none, then to the other surviving beneficiaries
- To the other surviving beneficiaries
- Other: _____

***If you need additional space to complete this section, please feel free to attach additional pages.**

If you have minor children, please list who you want to be named as guardians? _____

Real Property – Please provide the complete address for any property that you currently own and that will be transferred to the Trust:

For your Last Will and Testament, we typically list the person(s) you have named as the successor Trustee(s) of your Trust. If you want to select someone other than your successor Trustee(s), please name who you want to select as the successor personal representative of your Will? If no change, leave blank.

Name(s) of First
Successor PR(s):

Name(s) of Second
Successor PR(s):

For the Power of Attorney and Healthcare Surrogate, please list who you want as Power of Attorney and Healthcare Surrogate and a backup to that person.

Power of Attorney:

1. _____
2. _____

Healthcare Surrogate:

1. _____
2. _____