

QUESTIONNAIRE TO BE FILLED OUT FOR A FAMILY TRUST

1. Please fill in the blanks below with the names and relationships for any person who will be identified in the Trust document. If you need more space, attach a second sheet of paper.

_____ is the Grantor and Original Trustee.
(You may more than one)

_____ is my _____.

_____ is my _____.

_____ is my _____.

_____ is my _____.

2. Name of the Trust _____
It is best to keep the name simple and straightforward

3. In the event, the original Trustee(s) become incapacitated mentally or physically and cannot manage the Trust, please name two Standby Trustees who can fill-in until the original Trustee is able to resume his/her duties or permanently resigns. A Standby Trustee is a temporary position.

1. _____
Name Relationship

2. _____
Name Relationship

4. Please name two Successor Trustees. These Trustees are the Trustees that will permanently fill the Original Trustee(s) position when the Original resigns or passes away. They may be the same people who are named as the Standby Trustees.

1. _____
Name Relationship

2. _____
Name Relationship

5. Please list all property and items that will be placed into the Trust. Please include a full description of such property. If you need additional space, use a second sheet of paper.

6. A Trust has beneficiaries, people or organizations, who benefit from the Trust. Please list all of the beneficiaries as well as why they are beneficiaries.

7. Are there any restrictions or requirements you would like the Trust to contain?

8. A Trust must terminate at some point in time. Please describe your wishes for how and when the Trust should terminate. Do not worry about using the "right" language or terms here.

***Based upon your answers to the above questions, I will outline and provide suggestions for the best way to set up and manage your Family Trust.

If you have any questions, please feel free to contact me at (704) 841-0760.