

TRUST # _____

Trustee's Name _____

Address _____ Phone _____

Successor Trustee's Name _____

Address _____ Phone _____

Has someone else been named to manage, or to make investment decisions about, the trust's property or assets? If YES, who? _____

Address _____ Phone _____

Who established the trust? _____

Describe the property or assets now in the trust, or which will go into the trust upon your death:

Approximate value of property or assets \$ _____ Was a Gift Tax Return Filed? _____

Is the trust in effect now, or does it take effect upon your death? _____

IF IT IS IN EFFECT NOW: Name of Trust _____

Federal Tax I.D.# _____ Date of Trust _____

Is the trust revocable or irrevocable? _____

Who is (are) the beneficiary (beneficiaries) of the **property or assets** in the trust?

1. Primary Beneficiary's Name _____

Address _____ Phone _____

2. Primary Beneficiary's Name _____

Address _____ Phone _____

1. Successor Beneficiary's Name _____

Address _____ Phone _____

2. Successor Beneficiary's Name _____

Address _____ Phone _____

Who is (are) the beneficiary (beneficiaries) of the **income** of the trust?

1. Primary Beneficiary's Name _____

Address _____ Phone _____

2. Primary Beneficiary's Name _____

Address _____ Phone _____

1. Successor Beneficiary's Name _____

Address _____ Phone _____

2. Successor Beneficiary's Name _____

Address _____ Phone _____

What is the approximate annual income from the trust? \$ _____

When does the trust terminate for each beneficiary? _____

To whom is the property or assets transferred upon termination of the trust?

1. Name _____

Address _____ Phone _____

2. Name _____

Address _____ Phone _____