



A FINANCIAL LEGAL SERVICES CORPORATION

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BASIC TRUST QUESTIONNAIRE

Your Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____
Gender: Male Female Birth date: _____ Age: _____
Social Security Number: _____

Marital Status? Single Married Divorced Widowed Domestic Partnership

Partner\Spouse's Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____

Are you at least 18 years of age and of sound mind? ____

Will you serve as Trustee?

- Yes
 No
 Let decide after we discuss the issue

Name Your Successor Trustee

Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____
Gender: Male Female Birth date: _____ Age: _____

Name Your Alternate Successor Trustee

Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____
Gender: Male Female Birth date: _____ Age: _____

Describe an item(s) of property you want to hold in trust. [Married individuals must have the consent of their spouse to put community property assets in a trust]
(Attach an additional page if needed and label: titled or not titled property)

Titled Property (property that has a title, i.e., car, house, stock, etc.)

Non-Titled Property (property that does not have a title, i.e., furniture, jewelry, etc.)

Distribution of Your Trust Property

How do you want your trust property to be distributed at your death? You have two choices:

- All trust property to one or more beneficiaries.
(Attach an additional page if needed)

Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____
Gender: Male Female Birth date: _____ Age: _____

Name Your Alternate Successor Beneficiary

Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____
Gender: Male Female Birth date: _____ Age: _____

- Different items of property to different beneficiaries.
(Attach an additional page if needed)

Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____
Gender: [] Male [] Female Birth date: _____ Age: _____
Item(s) _____

Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____
Gender: [] Male [] Female Birth date: _____ Age: _____
Item(s) _____

Name Your Alternate Successor Beneficiary
(Attach an additional page if needed)

Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____
Gender: [] Male [] Female Birth date: _____ Age: _____
Item(s) _____

Name your Residuary Beneficiary

Name one or more persons or organizations you want to be your residuary beneficiary.

Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____
Gender: [] Male [] Female Birth date: _____ Age: _____

Name Your Alternate Residuary Beneficiary

Full Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: (please include cell phone numbers) _____
Email: _____
Gender: [] Male [] Female Birth date: _____ Age: _____

Setup Childs Subtrust or Custodian

Do you have any beneficiaries under 25?

Yes

No

If yes would you like to arrange management of the property the young beneficiary will inherit?

Yes

No

Let me decide after we discuss this issue

There are two methods to choose from

Name a “custodian” to manage the property, under the Uniform Transfers to Minors Act. In Washington, management musts cease when the beneficiary reaches age 21.

have the property stay in a “child’s subtrust” until the beneficiary reaches the age you specify, up to 35.

Additional Provisions: