

Comprehensive Trust & Estate Planning Questionnaire

Section 1: Basic Trust Information

1. Proposed Name of Trust: _____

2. Type of Trust: [ ] Revocable Living Trust [ ] Irrevocable Trust [ ] Charitable Trust [ ] Other: _____

3. Date Trust to be Established: _____

Section 2: Trust Creator (Grantor) Information

1. Full Legal Name: _____

2. Other Names Used (if any): _____

3. Date of Birth: _____

4. Social Security Number: _____

5. Citizenship Status: _____

6. Home Address: _____

7. Phone Number: _____

8. Email Address: _____

9. Marital Status: [ ] Single [ ] Married [ ] Divorced [ ] Widowed

10. Spouse's Full Name (if applicable): _____

Section 3: Trustee Information

Initial Trustee:

- Full Name: _____

- Address: _____

- Phone & Email: _____

Successor Trustee(s):

1. Name: _____



Relationship: _____

Contact Info: _____

Section 4: Beneficiary Information

Primary Beneficiaries:

- Full Name: ----------

  DOB:----------

  Relationship:_____

  Share: _____(%)

Full Name: ----------

  DOB:----------

  Relationship:_____

  Share: _____(%)

Full Name: ----------

  DOB:----------

  Relationship:_____

  Share: _____(%)

Full Name: ----------

  DOB:----------

  Relationship:_____

  Share: _____(%)

Contingent Beneficiaries (if any):

Full Name: ----------

  DOB:----------



Relationship:_____

Share: _____(%)

Conditions_____

Section 5: Asset Schedule

1. Real Estate:
   Address: _____

   Ownership: _____

   Value: _____

2. Bank Accounts:
   Institution:

   Type:

   Last 4 Digits:

   Ownership

   Institution:

   Type:

   Last 4 Digits:

   Ownership:

   Institution:

   Type:

   Last 4 Digits:

   Ownership

3. Investment Accounts:

   Institution:



Type:

Last 4 Digits

Institution:

Type:

Last 4 Digits

Institution:

Type:

Last 4 Digits

4. Life Insurance:

   Company:

   Policy Number:

   Beneficiaries:

   Value
5. Personal Property:

   Description:

   Location:

   Value

Section 6: Trust Objectives

What are your primary goals for this trust?

[ ] Asset Protection [ ] Probate Avoidance [ ] Tax Planning [ ] Charitable Giving

[ ] Care for Minor Children or Dependents [ ] Wealth Transfer [ ] Other: _____

Distribution Instructions: _____



Section 7: Advisors

Attorney: Name & Contact Info

CPA/Tax Professional: _____

Financial Advisor: _____

Section 10: Supporting Documentation Checklist

[ ] Real Estate Deeds

[ ] Bank and Investment Statements

[ ] Insurance Policies

[ ] Existing Trust Documents

[ ] Power of Attorney or Will

[ ] Personal ID for Grantor(s) and Trustee(s)