



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)