

Your Name TRUST INFORMATION

Instructions:

Complete this form by **replacing the information in red with your personal information**. You may add additional information or comments as needed. **The red fonts make your information stand out to be captured easier**, but they are not required in case you have difficulty with it. When complete, email the form to Bob Lock at: debtlawyer@gmail.com

1. Name of trust: [It is not recommended that you use your name or other information that would make it easy to identify the trust as associated with you, for privacy purposes.] **TRUST NAME**

Notes:

1. A Trust is an entity. As such, it is written in all upper case.
2. Do not use the word "TRUST" within the Trust's Name, as this represents the type of entity.
3. Do not use the words "REVOCABLE" or "IRREVOCABLE" within the Trust's Name, as this represents the specific type of Trust.

2. Trust Address: **Street Address**
City, State Zip
Phone Number

3. Grantor of the trust [Name of the person(s) putting assets into the Trust]: **Grantor's Name**

4. Corpus of the trust: [List of assets you want to transfer into trust, such as currency, etcetera]:

Currency

5. Trustee(s) Name & Address: [Trustees are those who will be handling the administrative tasks of the Trust, such as setting up bank accounts, paying bills, etc.]:

Trustee 1 Info:

Name
Street Address
City, State Zip

Trustee 2 Info (**if applicable**):

Name
Street Address
City, State Zip

Notes: A Trustee can be the same person as the Grantor.

A Trustee has a fiduciary duty to manage trust assets in the best interests of beneficiaries as outlined in the trust agreement.

6. Trust Protector [This is an optional role to act as an overseer to protect the beneficiaries by directing or restraining the Trustees in relation to their administration of the trust.]:

Notes: A Trust Protector cannot be any Trustee listed in #5 above.

A Trust Protector cannot be any Grantor listed in #3 above.

A Trust Protector cannot be any Beneficiary listed in #7 below.

N/A (If providing a Trust Protector, please include their full mailing address)

7. Beneficiaries Names & Address [Beneficiaries can be people, other entities, charities, etc.]:

Beneficiary 1 Info:

Name

Street Address

City, State Zip

What % of the assets will be left to this Beneficiary upon the Grantor's death?

Beneficiary 2 Info:

Name

Street Address

City, State Zip

What % of the assets will be left to this Beneficiary upon the Grantor's death?

Notes: Please provide all of the info above for each Beneficiary you want added.

A Beneficiary is for whom the trust is created to benefit.

A Beneficiary is not typically a Grantor or Trustee, as this may cause tax repercussions and/or conflicts of interest.

The percentages of assets for all Beneficiaries listed, summed up, must equal 100%

8. County within the State: e.g., Harris County in Texas

9. Trust Type = Irrevocable or Revocable [choose one]: Trust_Type

Note: Irrevocable prohibits the removal of assets, but it does not prohibit future changes such as asset additions, trustee changes, etc.

10. A unique EIN assigned by the IRS is required for each Trust. This is currently true for the Common Law Trust, too. Please obtain the EIN per the instructions below.

- i. Go to the following website:
<https://sa.www4.irs.gov/modiein/individual/index.jsp>
- ii. Click on Begin Application
- iii. Click on Trusts and Continue
- iv. Click on Revocable or Irrevocable, based on your choice, and Continue
- v. Enter Grantor Name as appears on Social Security Card and SSN and Continue
- vi. Check Grantor, Trustee, Beneficiary selection and Continue
- vii. Do **not** check the Sec 645 box
- viii. Enter Trust Address and Continue
- ix. Enter Trust Name & Date of Funding (typically Today's Date)
- x. Select No Employees and Continue
- xi. Check Receive EIN Letter Online and Continue
- xii. Review and Submit
- xiii. Write down EIN and open & save the EIN Letter as a file on your computer. This is a critical document to keep in your files.
- xiv. Finish

11. Please provide your Trust's EIN here: ## #####