

INTAKE FORM

Trust Grantor Name:(as per birth certificate)_____

Address: (mailing and street)_____

Telephone Number:_____

Name of Trustee (s) for Trust:_____

Address and telephone number of
Trustee(s)_____

Successor Trustee(s) if first named can't
serve:_____

Name, address, phone number of person you are appointing as your Personal Representative in
Will:_____

Name, address, phone number and social security number of person you are appointing as your
Successor Personal
Representative:_____

Upon your death, to whom do you desire to leave your furniture, furnishings, jewelry, art,
automobiles, etc.:_(will be in separate writing than trust or will)

Do you desire to leave a gift of money to specific
beneficiaries:_____

Is this to be left to any minors:_____

List any specific bequests you wish to be in your Will: (for animals or
other)_____

To whom do you desire to leave the remaining balance of your trust (include name, address and relationship you're your death):

If Trust for Minor Children is included, at what age shall the trust terminate _____; are all assets distributed to child at this age? _____

Other instructions you wish to be in your Will:

Five Wishes Health Care Power of Attorney

Name, address, phone number of person to whom you are giving your power of attorney for health care decisions:

Name, address, phone number of successor to whom you are giving your power of attorney for health care decisions:

Name, address, and phone number of your physician:

If your physician cannot or will not act on your behalf, the name, address and phone number of a successor: _____

Durable Power of Attorney

Name, address, phone number of the person to whom you are giving your Power of Attorney: _____

Name, address, phone number of the successor to whom you are giving your Power of Attorney:

List of Assets to be placed in Trust:

Real estate: Please provide copy of all warranty deeds as title is currently held.

Bank accounts. Please provide copies of statement (without transactions) to show name on account, bank, address of bank, account number(s).

List the name of any current successor beneficiaries on account, other signatories, and your desire as to who will own this account upon your death

Car titles: Please provide copies. Also designate who would be on title for Transfer on death to keep out of trust and out of probate.

Stocks and Bonds: Please provide copies of account statements for name on acct, etc. Name any current successor beneficiaries on account, directions for new beneficiary (trust or individual)

List of personal assets (art, jewelry, silver, electronics, antiques, etc.) valued at over \$500:

Any other assets: Oil royalties, water rights, anything else of value