



THE LAW OFFICES OF
GABRIEL LENHART

TRUST DATA SHEET
Supporting Documents

Date: _____

Name: _____ Date of birth: _____

Address: _____

Home phone: _____ Work phone: _____

Cell phone: _____ Fax: _____

Email address: _____

FINANCIAL POWER OF ATTORNEY

The purpose of this document is for management of any assets that are not listed or held by the trust. Generally the individual you list here should be the same person(s) you selected as your trustee(s) of your trust.

Primary Agent

Name/Relationship: _____

Address: _____

Phone: _____ Email: _____

1st Alternate

Name/Relationship: _____

Address: _____

Phone: _____ Email: _____

2nd Alternate

Name/Relationship: _____

Address: _____

Phone: _____ Email: _____

WILL(S)

A special type of will, known as a pour over will, is provided with all revocable trusts to designate distribution of certain personal property not already transferred to the trust. Your executor of this will generally should be the same person as the primary trustee of your trust.

Primary Executor

Name/Relationship: _____

Address: _____

Phone: _____ Email: _____

1st Alternate

Name/Relationship: _____

Address: _____

Phone: _____ Email: _____

2nd Alternate

Name/Relationship: _____

Address: _____

Phone: _____ Email: _____



CONSERVATOR

Sometimes it is necessary to appoint a conservator for an incapacitated or incompetent person. Please identify the individual you would like as your conservator. That person should be someone familiar with your finances, wishes and desires, and has the time to manage your estate.

Primary Conservator

Name/Relationship: _____

Address: _____

Phone: _____ Email: _____

1st Alternate

Name/Relationship: _____

Address: _____

Phone: _____ Email: _____

2nd Alternate

Name/Relationship: _____

Address: _____

Phone: _____ Email: _____



Children

Please provide full names, addresses, and phone numbers of all your children, their ages and whether or not they are children of a prior marriage. Please note if you have a deceased child or an adopted child. If needed use back of this page.

Beneficiaries/heirs

Along with the children/adopted children listed above, please list any specific individuals or organizations you intend to inherit from your estate who are not your children or adopted children. If there are any minors (under age 18), please include their age(s). See paragraph 4 below to further describe how you choose to distribute your estate.



Distribution (*an important area to carefully consider*)

Distribution to your children (or other beneficiaries) will be in equal shares unless otherwise designated. If you choose not to distribute equally, please specify the percentage or specific amount of distribution to each named beneficiary. Include any specific instructions, if any, for distribution, i.e, over a specific period of time, so much per year, etc. Also, identify anyone who you listed or is related to you whom you specifically *do not* want to inherit.

