



THE LAW OFFICES OF
GABRIEL LENHART

TRUST DATA SHEET

Trustors/Settlors

You are the Trustor(s), sometimes called Settlor(s), of your trust, please provide your full legal name(s) and the following requested information in as much detail as possible.

Date: _____

Name: _____ Date of birth: _____

Address: _____

Home phone: _____ Work phone: _____

Cell phone: _____ Fax: _____

Email address: _____

Social Security number (optional for this data sheet): _____

What are your specific concerns? (Protect from probate, avoid estate taxes, asset preservation, nursing home pre-planning, my family told me I'm supposed to do this, etc.)

Successor Trustee(s)

List at least two persons (primary successor trustee and secondary successor trustee) who you would want to manage your trust if you cannot do so. You may also designate co-successor trustees where two people can work together as your trustees. Please provide relationship, phone numbers and addresses of all proposed trustees.

Primary successor trustee name(s) & relationship to you:

Address, email, and phone number of each person:

Secondary successor trustee name(s) & relationship to you:

Address, email, and phone number of each person:



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.



ASSETS TO BECOME THE TRUST ESTATE

All assets transferred to your trust become the trust estate and are not subject to probate.

Real estate. List your real estate including rental property and the form of ownership you hold, such as joint tenancy, tenants in common, as well as the address and parcel number for each property. We will also need a copy of each deed for each parcel that will be transferring to your trust.

The following categories are additional assets that generally become part of the trust estate in order to avoid probate:

Bank accounts, savings accounts, CDs, etc. Please include name of institution, type of account and the approximate value.

Bank name	Type of acct.	IRA (Y/N)	Est. value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____



Stocks, bonds, mutual funds, annuities, and other similar investments.

Please be specific as to the type of investment. In addition, we would like to review the most recent investment statements so we can determine whether or not the investment should become a trust asset.

Bank name	Type of acct.	IRA (Y/N)	Est. value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Additional IRAs, Roth IRAs, pensions, promissory notes, or business interests held by you individually or jointly. We will review the most recent investment statements so we can determine whether or not the investment should become a trust asset.



Life insurance policies. List the owner of the policy, the beneficiary, the face value, the cash value and the type (i.e. whole life, term, or universal life)

Automobiles, RVs, boats, etc. These items are not generally transferred to the trust estate unless the value of each individual asset is over \$75,000 such as RVs, boats, collectibles, etc.)

Please list here any questions, comments or concerns you may have regarding your estate, distribution, trustees or agents, and we will discuss these issues at our next meeting.

