

Trust Questionnaire – Williams Law Office, PC

Full Name of the person(s) establishing the Trust (as it is to appear on your documents)

Address: _____ Phone: _____
_____ Email: _____

County: _____ Work Phone: _____

Social Security Number: _____ Fax: _____

Employer: _____

What is the purpose for establishing a trust? _____

What will be the name of the trust? _____

Will the trust be put into place now, or at some time in the future? If in the future, what event will trigger the trust being put into place? _____

Will the trust be: REVOCABLE IRREVOCABLE

Name of trustee _____

Address of trustee _____

Name of 2nd trustee _____

Address of 2nd trustee _____

Beneficiaries of trust (list all names and relationship) _____

Property to be included in trust (be as detailed as possible) _____

Terms for distribution of trust property to beneficiaries _____

Terms for distribution of trust property upon the death of beneficiaries _____

Are there any special circumstances which need to be considered in your trust planning?
If so, what?

Do you want a no contest provision included in your trust? Y N