

**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 2<sup>nd</sup> trustee \_\_\_\_\_

Address of 2<sup>nd</sup> 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 \_\_\_\_\_

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Terms for distribution of trust property upon the death of beneficiaries \_\_\_\_\_

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

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