Trust Questionnaire
Instruction Sheet

The information you are gathering will be used to generate several very important legal documents. For that reason it is very important that all the information be accurate and easy to read. Please take your time, print clearly, and make sure all information is spelled correctly. Never assume you know how a person spells their name.

1. **Your Information.** Include your full name or the name you use to sign all legal documents. Use complete address.
2. **Significant Other's Information.** If single, check N/A. If married, same information applies as above for spouse.
3. **Children's Information.** List all of your children who are legally adopted. A single parent should not list step-children who are not legally adopted. In cases where there is a second marriage and there are children from a former marriage, indicate which spouse is the parent of that child (i.e., Husband, Wife, or Both). The Social Security number is optional. If the client does not know them it is ok. It is included only as an additional form of identification.
4. **Beneficiary Information.** This means after ALL Trustors have died. (Both Husband & Wife) This list should include only those who are to receive a percentage of the Trust. A person who is to receive only a specific item or cash amount should not be listed here.
5. **Successor Trustees.** After all Trustors have died, or are declared incompetent and unable to manage their own affairs, who is to be the person or persons to manage the Trust and carry out its provisions. The client may choose as to whether those listed will work as Co-Trustees (all together) or in the order listed.(i.e., Successor Trustee #1 would manage the Trust. If he(she) is unable or unwilling, Successor Trustee #2 would take over.) If the Trustees are to work "In Order", it is necessary to list only one person, however two is preferred. If all Successor Trustees listed are unable or unwilling to act as Trustees, Beneficiaries may select a Successor Trustee by majority vote.
6. **Personal Representative.** This is the person the client has selected to carry out the provisions of their "Last Will & Testament" (Pour-Over Will). For married couples, we automatically select the other spouse first and then the #1 Successor Trustee as an alternate. For a single person, we will automatically select the Successor Trustees in the order listed. Fill in question #6 only if the client wants it done differently. (Be sure to include the address if a different person is selected.)
7. **Guardian.** Be sure to include the County and State of Residence of the persons you have selected. It is necessary that you list only one person, however, two are preferred in case the first is unable or unwilling to act as guardian.
8. **Disinheriting.** List here any person that is related to you that you wish to exclude from receiving any part of the Trust estate under any condition.
9. **Additional Questions.** No explanation necessary.
10. **Life Insurance.** No explanation necessary.
11. **My Burial Wishes.** No explanation necessary.
12. **Significant Other/ Spouse's Burial Wishes (if applicable).** No explanation necessary.
13. **Estimated Value of Estate.** No explanation necessary.

Disclosure: *All trusts and legal documents are prepared by American Living Trust Services, Inc.* ELE Wealth Management, LLC and its affiliates do not provide legal or tax advice. Be sure to consult with your own tax and legal advisors before taking any action that could have tax consequences. Any estate plan should be reviewed by an attorney who specializes in estate planning and is licensed to practice law in your state.