

PERSONAL AND FINANCIAL ORGANIZER  
FOR YOUR LIVING TRUST

**1. GENERAL INFORMATION**

DATE: \_\_\_\_\_

**Marital Status**    Circle One:    Married    Single    Divorced    Widowed

Q1 Your Legal Name (First, Middle Name or Initial, Last) ** Name must match ID used for Notarizing	Q1 Soc. Sec. No.	Date of Birth
Q2 Spouse's Legal Name (First, Middle Name or Initial, Last) ** Name must match ID used for Notarizing	Q2 Soc. Sec. No.	Date of Birth
Q3 Name of Your Trust		
Q1 Home Address (Number, Street)	Q1 City	Q1.5,7 State    Q1 Zip    Q4, Q6 Q8 County
Home Phone (    )	Your Work Phone (    )	Spouse's Work Phone (    )

**2. PERSONAL INFORMATION**

	YOU		YOUR SPOUSE	
	YES	NO	YES	NO
A. Are you a U.S. Citizen ?	YES	NO	YES	NO
B. Do you have a will or trust now ?	YES	NO	YES	NO
C. How many living children do you have ?				
D. How many children under 18 do you have ?				
E. How many grandchildren do you have ?				

Legal Name(s) of your children	Date of Birth
1	
2	
3	
4	
5	

**3. TRUST DECISIONS: YOUR LIVING TRUST TEAM**

Back-Up Trustee(s)- Steps in at your disability or death. Can be your adult children and/or trusted friends.

Q9	1st Successor Trustee:
	Legal Name (Must match State ID):
Q10	2nd Successor Trustee:
	Legal Name (Must match State ID):

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4. "POUROVER WILL "

This document provides for after-death distribution of your personal effects and "pours over" other assets not held in the name of the trust, at the time of death, to the trust (through probate, if necessary).
Nomination and Appointment of Executors Executor(s)- The person(s) that will distribute single person or <b>husband's</b> assets after death. Your Executor is the same person as your Successor Trustee. *If married and you want your spouse, enter their name in 1st Executor*
Q11 1st Executor Legal Name (Must match State ID):
Q12 2nd Executor Legal Name (Must match State ID):
Executor(s)- The person(s) that will distribute <b>wife's</b> assets after death. Your Executor is the same person as your Successor Trustee. *If married and you want your spouse, enter their name in 1st Executor*
W11 1st Executor: Legal Name (Must match State ID):
W12 2nd Executor (Alternate) Legal Name (Must match State ID):

5. "GUARDIANSHIP"

**Nomination and Appointment of Guardians for minor children**

Q13 1st Guardian Legal Name (Must match State ID):
Q14 2nd Guardian (Alternate) Legal Name (Must match State ID):

6. HUSBAND/WIFE'S or SINGLE PERSON'S ASSET DURABLE POWER OF ATTORNEY

This document authorizes you to name an agent to act for you in any way you can act for yourself.
Designation of agent(s) (attorney in fact) Agents: The persons that will make financial decisions for <b>single person or husband</b> . Your Agent is the same person as your Successor Trustee. *If married and you want your spouse, enter their name in 1st Agent*
Q15 1st Agent: Legal Name (Must match State ID):
Q16 2nd Agent: (Alternate) Legal Name (Must match State ID):
Agents: The persons that will make financial decisions for <b>wife</b> . Your Agent is the same person as your Successor Trustee. *If married and you want your spouse, enter their name in 1st Agent*
W15 1st Agent: Legal Name (Must match State ID):
W16 2nd Agent: (Alternate) Legal Name (Must match State ID):

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**7. HUSBAND/WIFE'S or SINGLE PERSON'S HEALTH CARE DURABLE POWER OF ATTORNEY**

This document authorizes you to name someone ("agent") to make health care decisions for you if you are no longer able to communicate your wishes regarding such care.	
Designation of agent(s) (attorney in fact) Agents: The person that will make <b>health care decisions for single person or husband.</b>	
*If you want your spouse, enter their name in 1st Agent*	
Q17 1st Agent:	
Legal Name (Must match State ID):	Phone #:
Address:	
Q18 2nd Agent:	
Legal Name (Must match State ID):	Phone #:
Address:	
Agents: The person that will make <b>health care decisions for wife.</b>	
*If you want your spouse, enter their name in 1st Agent*	
W17 1st Agent:	
Legal Name (Must match State ID):	Phone #:
Address:	
W18 2nd Agent (Alternate):	
Legal Name (Must match State ID):	Phone #:
Address:	

**8. DISTRIBUTION TO FINAL BENEFICIARIES AFTER DEATH OF TRUSTOR(S)**

Q21 Circle Age of Distribution to Final Beneficiaries <b>(21) (25) ( )</b>	
Q22 Age and percentage each beneficiary is to receive. Example 1: Mary Allen, 100%. Example 2: Mary Allen 50%; Thomas Smith, 50%	
1. Legal Name:	2. Legal Name:
Percentage:	Percentage:
3. Legal Name:	4. Legal Name:
Percentage:	Percentage:

Q23 Distribution of deceased beneficiary's share.	
Official Language:	
...the share of such deceased beneficiary shall...	
<b>Option 1:</b> be distributed to his or her then living children. If the deceased beneficiary has no living children, the deceased beneficiary's share shall be distributed to the other named beneficiaries.	
<b>Option 2:</b> be divided proportionately among the other named beneficiaries	
<b>Option 1</b>	<b>Option 2</b>

**9. NAMES OF ALL CHILDREN OF HUSBAND FROM A PREVIOUS RELATIONSHIP**

Q24 Name and Date of Birth	
1 Legal Name:	D.O.B:
2 Legal Name:	D.O.B:
3 Legal Name:	D.O.B:
4 Legal Name:	D.O.B:

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**NAMES OF ALL CHILDREN OF WIFE FROM A PREVIOUS MARRIAGE**

Q25 Name and Date of Birth	
1 Legal Name:	D.O.B:
2 Legal Name:	D.O.B:
3 Legal Name:	D.O.B:
4 Legal Name:	D.O.B:

**10. FINANCIAL INFORMATION**

This information is being entered for discussion purposes and will need to be added to the schedules in your trust

1. Do you own a **home** or any **other real estate** (Please attach a copy of the Grant Deed)

Description and location	Title in whose name

2. Do you have any **interest bearing accounts** ( savings, money market) and/or **CD's** ?

Name and address of bank	Account Number(s)

3. Do you own any **stocks, bonds or mutual funds** (including company stock) ?

# of shares	Name of Security	Account Number(s)

4. Do you have any **profit sharing, IRA's** or pension plans ?

Description and location	Beneficiary

5. Do you have any **life insurance** policies and/or **annuities** ?

Name of Company	Policy Owner	1st Beneficiary	2nd Beneficiary

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**11. SPECIAL GIFTS OF TRUST PROPERTY**

If you desire to give special gifts of trust property apart from a share of the remainder of the trust estate, write the names of the beneficiaries and a description of the gift(s) each is to receive.

Q 26 Examples of Special Gifts

Example 1 To Mary Allen, (10,000.00). To Susan Smith, Three Thousand Dollars

Example 2 To Thomas Smith, The real property situated in the County of Los Angeles etc. etc.

Description of Item	Name of Beneficiary

**12. SPECIAL INSTRUCTIONS FOR FUNERAL/BURIAL**

1	What type of service do you want, how to elaborate, and where? Any special people to contact? Do you want cremation? Do you have a pre-paid (pre-arranged) funeral plan?
2	What is the name and location of the cemetery? What are the plot and deed numbers?
	Name of Cemetery:
	City and State:
	Plot Number: <span style="margin-left: 150px;">Deed Number:</span>
3	Have you discussed a budget for funeral and final expenses? If yes, where can instructions be found?