

KING | LAW

LAW OFFICE OF GILES W. KING

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TRUST INFORMATION FORM

Personal and Confidential

Client information		
Full name:	Date of birth:	U.S. Citizen: Yes No
Home Address:		Home telephone:
Employer:	Occupation:	
Business Address:		Business telephone:

Spouse – <i>if applicable</i>		
Full name:	Date of birth:	U.S. Citizen: Yes No
Employer:	Occupation:	
Business Address:		Business telephone:

Marriage

Date of Marriage to Spouse? _____

Any Pre-Nuptial Agreement signed? _____

Children

Please list ALL your children, including deceased children, children born out of wedlock, and children you wish to omit from your estate plan. Identify any child who is not a natural or adopted child of both you and your spouse.

Name of Child	Date of birth	Marital status	Child of		
			husband	wife	both
			husband	wife	both
			husband	wife	both
			husband	wife	both
			husband	wife	both
			husband	wife	both
			husband	wife	both
			husband	wife	both
			husband	wife	both

Have any children received an advance on their inheritance or are financially indebted to you? **Yes No**

If so, please explain:

Is there any reason NOT to treat your children equally? **Yes No**

If so, please explain:

Are any of the children under a disability? **Yes No**

If yes, please explain:

Do you have any special concerns or objectives regarding your children? **Yes No**

If yes, please explain:

Trust

NAME OF TRUST: _____

If a trust is appropriate to include in your estate plan, who should be the trustee? A trustee is the person or entity who is responsible for managing the assets placed into the trust. A trustee manages the assets for your children or other beneficiaries until they reach specified ages. If you do not establish a trust, children inherit at age 18. You may name an individual, bank or trust company, or both to act as your trustee.

Name:		Relationship to you:	
Address:	City:	State:	Zip code:

Alternate/Successor trustee

Name:		Relationship to you:	
Address:	City:	State:	Zip code:

Assets

Use approximate values under each person showing ownership of each asset.

Personal assets	Value in husband's name	Value in wife's name	Value in spouses' joint names
Home	\$	\$	\$
Other real estate	\$	\$	\$
Checking account	\$	\$	\$
Savings account	\$	\$	\$
Money market account	\$	\$	\$

Automobile	\$	\$	\$
Personal property	\$	\$	\$
Stocks & bonds	\$	\$	\$
Retirement accounts			
IRA	\$	\$	\$
Pension	\$	\$	\$
Profit Sharing/401K	\$	\$	\$
Does your retirement plan have a death benefit? Yes No			

Other personal assets

Describe and give a value of any items of substantial value, such as automobiles, works of art, jewelry, etc. Be sure to include any items listed on an insurance rider.

Description	Value in husband's name	Value in wife's name	Value in spouses' joint names
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Total personal assets	\$	\$	\$

Business assets

Name of business	Form of business	Total Value	Percent owned by husband	Percent owned by wife
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%
Total business assets		\$	%	%

Liabilities

Description	Value in husband's name	Value in wife's name	Value in spouses' joint names
Home mortgage	\$	\$	\$
Other mortgage	\$	\$	\$
Debts to Family Members	\$	\$	\$
Other debts (describe)	\$	\$	\$
	\$	\$	\$
Total liabilities	\$	\$	\$