



KELLEY & ASSOCIATES

AMENDMENT WORKBOOK

EXISTING TRUST INFORMATION

Name of Trust: _____

Date of Trust: _____

CHANGE IN MERITAL STATUS

Spouse Name: _____

Marriage Date: _____

Marriage Place: _____

CHANGE IN CHILD STATUS

New Child Name: _____ Date of Birth: _____

New Child Name: _____ Date of Birth: _____

New Child Name: _____ Date of Birth: _____

New Child Name: _____ Date of Birth: _____

CHANGE IN SUCCESSOR TRUSTEES

New Primary Successor Trustee: _____

New Secondary Successor Trustee: _____

New Tertiary Successor Trustee: _____

NEW ASSETS

NEW DISTRIBUTION STATUS

OTHER AMENDMENT CHANGES

COMPLETE

Once you have completed this Workbook, you have a few options:

- a. You can upload the document through our Contact Portal on our website at Kelley-assoc.com.
- b. You can scan it and send it to admin@kelley-assoc.com.
- c. You can mail or physically deliver it to our office at 255 E Rincon St. #211 Corona CA 92879 as quickly as you can.

FIRM CONTACT

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